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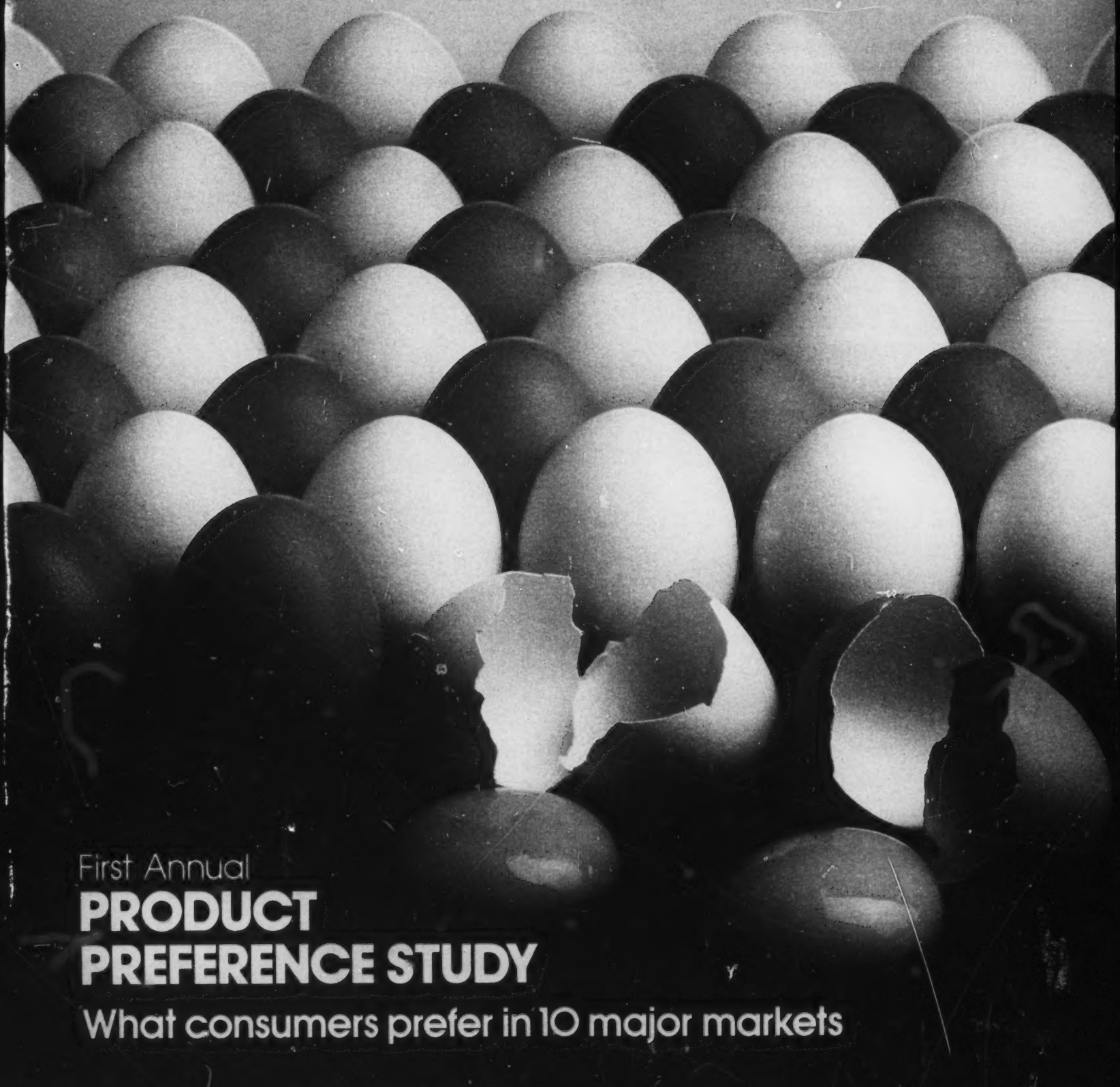

First Annual
PRODUCT PREFERENCE STUDY
What consumers prefer in 10 major markets

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SUPERMARKET BUSINESS

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PAGE 19

FIRST ANNUAL PRODUCT PREFERENCE STUDY THE TEN MARKET "COUNTRY WITHIN A COUNTRY"

The much reported "homogenization" of America isn't all it's cracked up to be. Thanks to mass media, styles and trends in consumption seem to emerge almost almost simultaneously in Tampa and Tacoma. But, supermarket operators know that what sells on one side of town may languish on the other, given the influence of contrasting demographic mixes. How much product usage patterns can differ from one market to the other is the subject of this report.

Thanks to first-time and exclusive access to syndicated research by Mediamark Research Inc. among over 40,000 households, SUPERMARKET BUSINESS can relate the demographic and geographic characteristics of consumers to their purchasing patterns in greater depth than previously possible. The 51.8 million adults living in the subject markets comprise a veritable "country within a country." Examination of how and what they buy can provide usable data for operators in any part of the country.

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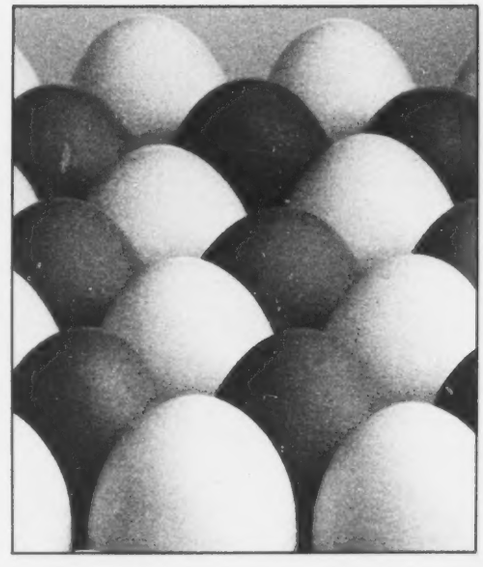

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RE-TREADING INNOVATIONS IN AKRON, OHIO

"Nothing's original here," says Russ Vernon of his West Point Market. But with only 10,500 square feet of selling space and some tried-and-true merchandising ideas, along with a healthy dose of individual flair, this store is managing to keep the competition at bay. And do some of the best food retailing in the state.

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FIRST ANNUAL PRODUCT PREFERENCE STUDY

THE TEN MARKET 'COUNTRY WITHIN A COUNTRY'

BY ROBERT DIETRICH

If population were the only criterion, the 10-market "country within a country" reported on here for the first time could take a seat at the United Nations and outrank countries such as Egypt and Turkey.

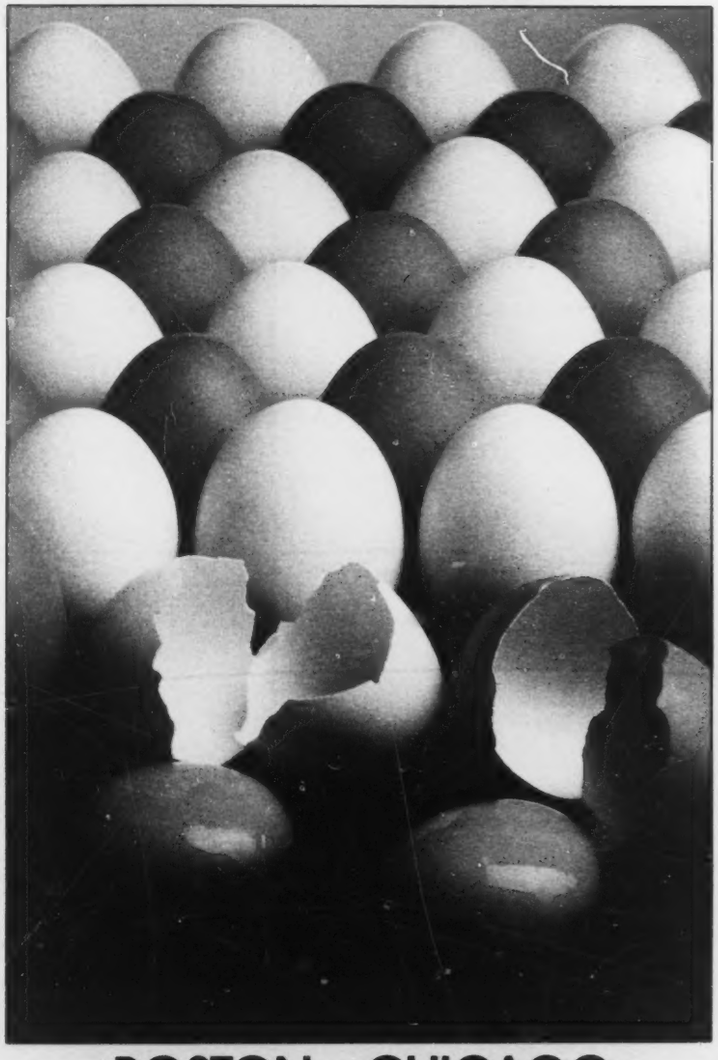
The 51.8 million adults living in 10 major ADI's (Areas of Dominant Influence) account for 31.9 percent of the U.S. total. What they buy in supermarkets evidences such astounding variations from market to market, that any concept of one homogeneous U.S. market—or an average American consumer—must go out the window.

Consider, for example, that a San Franciscan is 150 percent more likely to buy imported beer than a Clevelander. Or that a homemaker in Boston is 118 percent more likely to buy brownie and cookie mixes than one in Detroit.

Such differences are evidence of the economic power generated when two major tides meet in the supermarket aisle—one of regional determination and another of demographic determination.

While study of variations in the consumption of any single product in the 10 markets can be both fascinating and profitable, securing, organizing and interpreting the data would be a Herculean task even in this age of computers.

Fortunately, SUPERMARKET BUSINESS readers now have access to the largest and most comprehensive databank of its kind in the first large-scale publication of the data. Mediamark Research Inc., N.Y., has made available exclusively for this issue data based on detailed interviews with 41,010 adults (20,730 of whom live in the 10 markets).



BOSTON • CHICAGO
CLEVELAND • DETROIT
LOS ANGELES • PHILADELPHIA
NEW YORK • SAN FRANCISCO
ST. LOUIS • WASHINGTON, D.C.

The usage figures have been organized into 18 categories, roughly comparable to supermarket departments, to facilitate a store operator's evaluation of product performance relative to his or her own operation.

As is further detailed in the "How to" section, the usefulness of this study is not limited to retailers who happen to be in one of the 10 markets. At the beginning of the two-page presentation for each market, the figures for Outstanding Demographics enable retailers to decide which market is most similar in profile to their own market or trading area and then to make use of the product preference data.

No store, of course—even those falling within one of the 10 markets—will have a customer mix which precisely duplicates that in any of these markets. The purpose of this study is not to provide ready-made answers, but rather to present valuable, and previously unavailable to a universal industry readership, data that can stimulate a meaningful reappraisal of product mix.

Continued on page 22

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HOW MRI PROBES 41,000 RESPONDENTS

Mediamark Research Inc., is a market reserach firm that serves a broad list of consumer product advertisers, advertising agencies and media with exclusive syndicated research data. Data projectible to the U.S. population are generated for over 800 product categories and product types, and more than 4,000 brands.

In addition, media measurements include readership of 165 magazines, as well as broadcast media habits, including radio listening and cable TV.

Each year, in a massive operation, MRI interviews 20,000 respondents in the course of two waves of fieldwork. The enormous sample size enables valid interpretation of product usage and media habits by various demographic segments. The data generated are used primarily for maximizing the effectiveness of advertising expenditures.

Half of MRI's annual sample is allocated to 10 major markets or ADI's ('Areas of Dominant Influence), enabling MRI to publish statistically reliable data on each of the markets to meet the interests of its subscribers in the marketing and advertising communities.

The data that are presented in this report come from MRI's 1983 10 Mediamarket Survey, which is based on data from four waves of interviews over two years.

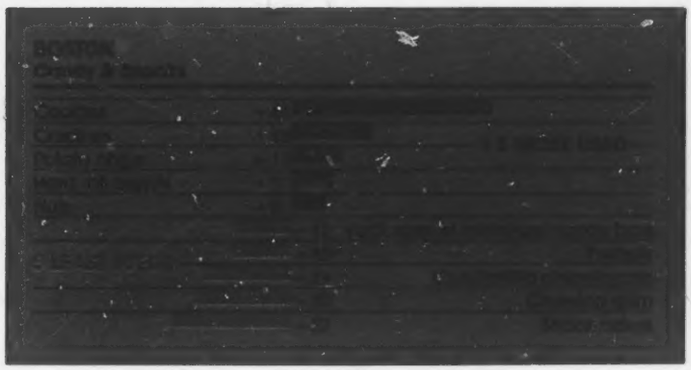
While the 10 Mediamarket Survey is a valuable tool for the allocation of advertising monies, it should be stressed that the survey is a supplement to MRI's major release each year of 20 volumes of product usage data cross-tabulated by demographics and media habits.

NOTE TO READER: The MRI data presented in this report are under copyright by Mediamark Research Inc. and are presented here with their permission.

WHAT THE BAR CHARTS MEAN

For each of the 10 markets included in this study, usage patterns are charted for 18 major product categories (see table). Although several categories contain over two dozen kinds of products, space limitations permit only the most "actionable" figures to be shown.

This means that only the five products where consumption in the market is most *above* the U.S. average, and the five where consumption is most *below* the U.S. average are shown.



The example shown here is the Candy & Snacks category in Boston. Out of the 15 types of products included in this category, the five that most exceed the norm are Cookies, Crackers, Potato Chips, Hard Roll Candy and Nuts. Cookies, for example, achieve heavy usage (four or more packages in the last 30 days, as shown in the Index) among 18.7 percent of U.S. female homemakers. But in Boston the incidence is 26.9 percent—an outstanding 44 percent edge over the national figure. The story is similar for the other four "plus" bars that are charted.

Expectedly, Bostonians don't sate themselves with every variety of Candy & Snacks. In a polar relationship to Cookies, we find Snack Cakes, with a consumption pattern that falls short of the national incidence by 27 percent, along with four other underachievers. Going briefly through the arithmetic here, 34.1 percent of U.S. homemakers report they are buyers of snack cakes, but the 24.9 percent rate in Boston falls 27 percent short of this.

Store operators in Boston—or in an area whose demographics are similar—might want to consider whether their stocking and inventory policies fully reflect these dramatic differences.

Other markets, of course, show the flip side of the Boston profile. In San Francisco and Washington, D.C., for example, Cookies show little snap; and in Pittsburgh and St. Louis Snack Cakes twinkle with heavy consumption.

In considering the 10 markets for a moment as a kind of "country within a country," the picture is primarily one of diversity among the markets where, as in the cases of Cookies and Snack Cakes, some markets are far above average in usage while others are far below. But this urban conglomerate created by the MRI computers also exposes some pockets of amalgamation, where the 10 markets pull away from the rest of the country by uniformly registering either extremely high or extremely low relative preference for a category.

If, for example, the 10 markets were considered as a unity, consumption of Flavored and Seasoned Rice Mixes would surpass the national norm by an astounding 29 percent. By the same token, evaporated milk would underperform by 24 percent.

While keeping such kinks in comparative market performance in mind, however, what's most prevalent—and most actionable—in the data shown in this report are the *differences* in product usage from one market to the next. How an understanding and recognition of these differences can be applied to your own operation is discussed in the section on "How to Use This Report."

HOW TO USE THIS REPORT

"You are what you sell" (or, at least, what you offer for sale) might well be the supermarket operator's credo. Every day you orchestrate the progression of a tide of products from your suppliers' processing plants and warehouses to your customers' pantries and refrigerators.

Your own intuition has no doubt been honed by experience into a sixth sense that divines the *kinds* of products your customers will want to buy. But there's no harm in supplementing that asset with a *seventh* sense in the form of market research that is accurate, detailed, projectable and—most important—applicable to your operation on a day-to-day basis.

Even if you don't happen to be operating in one of the 10 markets included in this report, you can put these data to work. What distinguishes any one of these markets is demographics. For each market we've shown what are called Outstanding Demographics, which are the ways in which that market's population of female homemakers exceeds the national norm by at least 10 percent in any of these seven demographic characteristics:

—Age
—Education
—Employment status
—Size of Household
—Household income
—Marital status
—Race

From what you already know about your market and your own trading area, you can easily identify which market or markets resembles your situation. (Perhaps San Francisco, with its tilt toward younger, college-educated, single working women. Or even St. Louis, the most "average" market in its confirmation of national demographic norms.)

Once you start examining the five winners and five losers within each of the 18 product categories, you might want to take a fresh look at some of your policies and practices in the following areas:

Space Allocation—Some of the products winning big plus scores may suggest why they sell down so fast and leave you with holes on the shelf. Perhaps they need more breathing space for the lines you already carry in the form of additional facings. And a look in the order book might inspire you to expand your offerings—more brands, more flavors, more sizes, for example. The bottom of the same chart may suggest where all this additional room is coming from—from cutting back space on types of products that your types of customers just don't cotton to. No need to decapitate—just some judicious pruning.

New Item Acceptance—If the research confirms that your customers are likely to be big buyers of a certain type of product, this should increase your success score in picking new-item winners. For a product they're interested in, they're more likely to have noted the manufacturer's introductory advertising, and perhaps even to have clipped coupons in print ads, to be primed to buy. You may even want to consult with the salesperson or broker of the new product on the possibilities for special merchandising efforts. Here again, the flip side of the coin is to brake your enthusiasm for low-interest categories.

Promotions and Displays—For above-average-usage products, your customers are avid for, and receptive to, news. You can be sure that the tuna mavens scan your ad to see if you've included a special for them. They're equally aware of whether your end-aisle and other displays feature high-interest or yawn-provoking products. Too many displays occupy space and gather dust because, although the deal was good, it's the wrong product in the wrong store at the wrong time. Make way in your display space for the products your customers will be responsive to—and keep the others out of the way.

TURN TO PAGE 24 FOR PRODUCT INDEX

PRODUCT INDEX

Product	Percent Using Total U.S.	(Base)	Classification
A			
Adhesive bandages	59.6	(AU)*	HBA-A
Aftershave lotion	40.2	(7+ times L7D)**	HBA-M
Air filters, auto	41.6	(AB)*	GM
Air freshener sprays	35.6	(2+ cont. L3M)	H/C
Ale	6.1	(AU)*	Bev-E
Aluminum foil	27.5	(2+ rolls L30D)	Paper
Anti-freeze	51.0	(AB)*	GM
Athlete's foot remedies	12.9	(AU)*	HBA-A
B			
Baby foods	6.5	(AU)	Baby
Baby lotion	12.8	(AU)	Baby
Baby oil	19.7	(AU)	Baby
Baby ointment	12.0	(AU)	Baby
Baby powder	15.1	(3+ L7D)	Baby
Baby shampoo	17.6	(AB)	Baby
Bacon	46.1	(2+ lbs. L30D)	Pk/Pr
Baking mixes	30.3	(1+ pkg L30D)	Des
Bar soap	15.2	(7+ bars L30D)	H/C
Bar soap for babies	7.7	(AU)	Baby
Batteries	36.1	(5+ L6M)	GM
Batteries, auto	26.7	(AB)	GM
BBQ/seasoning sauces	42.9	(2+ bottles L3M)	C/S/S
Beans, prep. in a sauce	34.0	(2+ cans L30D)	Pk/Pr
Beer, domestic light/ low cal	17.6	(AU)*	Bev-E
Beer, domestic regular	29.6	(2+ glasses L7D)*	Bev-E
Beer, imported	12.0	(AU)*	Bev-E
Bleach	49.4	(2+ washings L7D)	H/C
Blusher	39.0	(6+ times L7D)***	HBA-W
Books/magazines	49.9	(participated L12M)*	GM
Bread	41.8	(3+ loaves L7D)	BF/BG
Breakfast cereals, cold	56.3	(4+ portions L7D)	BF/BG
Breakfast cereals, hot	35.1	(1+ serving L7D)	BF/BG
Breakfast snack bars	13.7	(AU)	BF/BG
Brandy/cognac	8.3	(AU)*	Bev-E
Breath fresheners	29.4	(4+ times L7D)*	HBA-A
Brownie/cookie mixes	23.5	(1+ pkg L30D)	Des
Butter	35.5	(1+ lb L30D)	Dairy
C			
Cake mixes, dry	36.7	(2+ pkg L30D)	Des
Calculator, hand-held or pocket	15.4	(purchased L12M)*	GM
Candy bars, pkg of miniatures	26.5	(AB)*	C/S
Candy bars, reg. size	45.1	(1+ bars L7D)*	C/S
Candy, hard roll	22.4	(AB)*	C/S
Cassette recorder/ player	12.6	(purchased L12M)*	GM
Cat food, canned	10.1	(1+ cans avg day)	Pet
Cat food, dry	18.5	(AB)	Pet
Cat food, moist	9.5	(AB)	Pet
Cat litter	13.9	(AB)	Pet
Carpet/rug cleaner	40.8	(AB)	H/C
Catsup	33.1	(2+ bottles L30D)	C/S/S
Cereals, infant	5.7	(AU)	Baby
Cheese, American	39.0	(2+ lbs L30D)	Dairy
Cheese, natural or imp.	41.7	(3+ lbs L30D)	Dairy
Cheese, spread	16.4	(AB)	Dairy
Chewing gum	29.3	(2+ packs L7D)*	C/S
Children's cough syrup	12.8	(AU)	Baby
Cigarettes	27.3	(6+ packs L7D)	Tob
Cigars	4.2	(AU)*	Tob
Coating mixes	25.5	(AB)	C/S/S
Coffee, instant or freeze-dried (decaf)	24.0	(AU)	Bev-O
Coffee, instant or freeze-dried (reg)	36.9	(AU)	Bev-O
Coffee, ground	38.9	(3+ cups avg day)	Bev-O
Cola drinks, diet	30.9	(AU)*	Bev-E
Cola drinks, reg	41.3	(3+ drinks L7D)*	Bev-E
Cold cuts, packaged	25.2	(2+ lbs L7D)	Pk/Pr
Cold/sinus/allergy remedies	48.0	(AU)*	HBA-A
Cologne/perfume	49.8	(7+ times L7D)***	HBA-W
Complexion care products, men	22.2	(AU)**	HBA-M
Complexion care products, women	56.1	(AB)***	HBA-W
Cookies	18.7	(4+ pkg L30D)	C/S
Cordials/liqueurs	16.2	(AU)*	Bev-E
Corn on the cob, frozen	15.0	(1+ pkg L30D)	FF
Corn/tortilla chips	40.9	(1+ pkg L30D)	C/S
Cottage cheese	42.3	(1+ cont L30D)	Dairy
Cotton swabs	24.4	(3+ times L7D)	Baby
Cough drops	18.1	(2+ times L7D)*	HBA-A, C/S
Cough syrup	11.6	(2+ times L30D)*	HBA-A
Crackers	48.2	(2+ boxes L30D)	C/S
Cream substitutes, non-dairy	27.1	(AB)	Bev-O
Creme hair rinse, men	23.6	(AU)**	HBA-M
Creme hair rinse, women	47.8	(AU)***	HBA-W
Cups, disposable	21.8	(3+ cups L30D)	Paper
D			
Denture cleaners	19.6	(AU)*	HBA-A
Deodorants, anti-perspirants, men	29.6	(8+ times L7D)**	HBA-M
Deodorants, anti-perspirants, women	35.2	(8+ times L7D)***	HBA-W
Depilatories	12.9	(AU)***	HBA-W
Deviled ham/other meat products	15.0	(AU)	Pk/Pr
Diarrhea remedies	16.4	(AU)*	HBA-A
Diapers, disposable	12.7	(AB)	Baby/Paper
Diet control	56.9	(AU)*	HBA-A
Dinners, frozen	20.6	(1+ L30D)	FF
Dips, ready to serve	34.4	(AB)	Dairy
Dishwashing detergent, automatic	22.5	(4+ loads L7D)	H/C
Dishwashing liquid	35.7	(10+ sinkfuls L7D)	H/C
Disposable lighters	30.9	(AU)	Tob
Dog biscuits/treats	9.8	(2+ pkg L30D)	Pet
Dog food, canned	13.0	(1+ cans avg day)	Pet
Dog food, dry	18.1	(4+ lbs L7D)	Pet
Dog food, moist	11.3	(AB)	Pet
Dough products, refrig.	39.9	(1+ pkg L30D)	Dairy

Unless otherwise noted the base population for all percentages is female homemakers. Exceptions are indicated as follows:

*Adults
**Men
***Women

The base is further identified as follows:

AU = All Users
AB = All Buyers

When only "heavier users" are included, they are defined as follows:

L = Last
D = Days
M = Months

Example: L7D = Last 7 Days.

PRODUCT INDEX

Product	Percent Using Total U.S.	(Base)	Classification
Drain cleaners	16.7	(2+ cont. L6M)	H/C
Drink additives	20.6	(2+ servings L7D)	Bev-O
Drinks, mixed	32.4	(AU)*	Bev-E
E			
Eggs	35.2	(2+ dozen L7D)	Dairy
English muffins	24.7	(1+ pkg L7D)	BF/BG
Evaporated milk	44.2	(AB)	Pk/Pr
Extracts	39.0	(AB)	C/S/S/
Eyeliner	36.9	(AU)***	HBA-W
Eyeshadow	34.5	(4+ times L7D)***	HBA-W
Eye wash/drops	29.1	(AU)*	HBA-A
F			
Fabric softeners	41.3	(4+ washloads L7D)	H/C
Face creams/lotions	21.0	(8+ times L7D)***	HBA-W
Face powder, loose	18.4	(AU)***	HBA-W
Facial tissues	24.6	(3+ boxes L30D)	Paper
Feminine hygiene deodorant sprays	12.0	(AU)***	HBA-W
Feminine hygiene douches/suppositories	29.8	(AU)***	HBA-W
Fertilizer, garden	28.9	(used L12M)*	GM
Fertilizer, lawn (w/ weed control)	19.4	(used L12M)*	GM
First aid products	21.7	(AU)*	HBA-A
Fish/seafood, frozen	27.2	(1+ pkg L30D)	FF
Flea/tick care products (dog/cat)	32.6	(AB)	Pet
Floor wax/polish	20.0	(2+ cont. L6M)	H/C
Flour	61.6	(3+ lbs L30D)	Des
Foil, aluminum	27.5	(2+ rolls L30D)	Paper
Foundation makeup	39.6	(5+ times L7D)***	HBA-W
Frankfurters/weiners	25.4	(3+ lbs L30D)	Pk/Pr
Frosting/frosting mixes	38.4	(AB)	Des
Fruit, canned or jarred	44.4	(3+ cans L30D)	Pk/Pr
Furniture polish	19.5	(3+ cont. L6M)	H/C
G			
Garbage bags/trash can liners, plastic	39.4	(3+ pkg L7D)	Paper
Gelatin desserts, flavored	40.7	(2+ pkg L30D)	Des
Gin	11.6	(AU)*	Bev-E
Gravy/sauce mixes	18.7	(2+ pkg L30D)	C/S/S
H			
[illegible]care products, women	58.4	(AU)***	HBA-W
Hair coloring products, men	7.9	(AU)**	HBA-M
Hair coloring products, women	25.1	(AU)***	HBA-W
Hair conditioner, men	23.1	(AU)**	HBA-M
Hair conditioner, women	46.2	(AU)***	HBA-W
Hair setting products	12.4	(AU)***	HBA-W
Hair spray, men	26.3	(AU)**	HBA-M
Hair spray, women	54.3	(AU)***	HBA-W
Hair tonic/dressing, men	23.8	(AU)**	HBA-M
Ham, canned	15.1	(1+ lb L30D)	Pk/Pr
Hand/body cream/ lotion, men	50.0	(AU)**	HBA-M
Hand/body cream/ lotion, women	66.3	(5+ times L7D)***	HBA-W
Hand cleaners, heavy duty	15.5	(1+ times L30D)	H/C
Hash, canned	13.2	(AB)	Pk/Pr
Headache remedies/ pain relievers	58.7	(3+ times L30D)*	HBA-A
Hemorrhoid remedies	12.6	(AU)*	HBA-A
Home permanents	16.9	(AU)***	HBA-W
Honey	33.1	(1+ jars L6M)	BF/BG
Household cleaners	21.2	(5+ pkg L30D)	H/C
I			
Ice cream/ice milk/ sherbert	39.2	(2+ pints L7D)	FF
Indigestion aids/upset stomach remedies	49.8	(AU)*	HBA-A
Infant formula, prepared	4.9	(AU)	Baby
Insecticides, garden	18.8	(used L12M)	GM
Insect repellents	29.0	(AU)*	HBA-A
J			
Jams/jellies	31.9	(2+ jars L30D)	BF/BG
Juices/drinks, fruit	28.4	(2+ glass avg day)	Bev-O
Juice, grapefruit	14.7	(1+ glass L7D)	Bev-O
Juices, tomato/ vegetable	26.0	(1+ glass avg day)	Bev-O
L			
Laundry presoaks	16.1	(3+ loads L7D)	H/C
Laxatives	22.5	(AU)*	HBA-A
Light bulbs	35.3	(6+ bulbs L6M)	H/C
Lighters, disposable	30.9	(AU)*	Tob
Lipbalm	33.6	(1+ times L7D)*	HBA-A
Lipstick/lip gloss	50.8	(7+ times L7D)***	HBA-W
M			
Magazines/books	49.9	(participated L12M)*	GM
Main courses, frozen	17.4	(1+ servings L30D)	FF
Margarine	49.0	(3+ lbs L30D)	Dairy
Mascara	42.2	(4+ times L7D)***	HBA-W
Mayonnaise/mayo-type dressing	38.9	(2+ jars L30D)	C/S/S
Meat sticks	12.3	(AB)*	C/S
Metal polish	26.7	(AB)	H/C
Mexican foods	22.6	(2+ pkg L30D)	Pk/Pr
Milk, dry	17.3	(AB)	Bev-O
Milk, evaporated	44.2	(AB)	Pk/Pr
Milk, fresh	35.5	(2+ qts avg day)	Dairy
Mints	32.6	(AB)*	C/S
Motor oil	45.1	(7+ qts L12M)*	GM
Motor oil additives	14.7	(AB)*	GM
Mouthwash	36.8	(7+ times L7D)*	HBA-A
Mushrooms, canned	21.6	(2+ cans L30D)	Pk/Pr
Mustard	31.0	(2+ jars L30D)	C/S/S
N			
Nail polish	27.2	(2+ times L7D)***	HBA-W
Napkins, paper	29.2	(2+ pkg L30D)	Paper
Napkins, sanitary	32.8	(5+ times L30D)***	Paper, HBA-W
Nasal sprays	15.2	(AU)*	HBA-A
Nonstick cooking products	32.9	(AB)	C/S/S
Nuts	43.1	(1+ cont. L30D)*	C/S
O			
Oil filters, auto	54.2	(AB)*	GM
Oil, salad or cooking	18.0	(3+ pints L30D)	C/S/S
Orange juice, frozen	32.9	(2+ glasses avg day)	FF
Orange juice, not frozen	30.7	(1+ glass avg day)	Dairy
Oven cleaners	19.2	(2+ cont. L6M)	H/C
P			
Pain relievers/fever reducers, children	23.6	(AU)	Baby

Continued on page 78

BOSTON

Hold the Beans! What They Really Want Here is Cookies

Single, college-educated women distinguish the profile of the Bostonian homemaker. Further, of the 10 markets studied here, Boston alone has a percentage of whites that is at least 10 percent above the national average. A bigger regional favorite than baked beans may well be cookies, with both packaged cookies and cookie mixes outdistancing the national averages. Bostonians don't appear to spend their spare time working on their cars, judging by the negative performance of five products in the car care category. Products related to reading find favor.

OUTSTANDING DEMOGRAPHICS*
(Female Homemakers)

55-64	+12
Graduated college	+40
Attended college	+14
Graduated high school	+16
Employed part-time	+50
3-4 person household	+11
HH income $35,000 or more	+16
Single	+60
White	+10

*Percent difference from total U.S.

NOTE: All figures represent percent difference (plus or minus) from total U.S.

The incidence of children under six in the homes of Boston homemakers is 16.7%, by far the lowest in the 10 markets studied, validating the low consumption of non-HBA baby items here. English muffins are the breakfast of choice, along with some compatible jams or jellies.

Imported beer makes a heady showing here, even edging out domestic among those aged 18 to 24, among college graduates and among higher income households. And if the Boston Tea Party were taking place today, by the way, they'd probably be dumping **instant** iced tea mix into the harbor.

No need for capacious dessert ingredients departments here. Bostonians prefer their sweets prepared by someone else, rather than in their own kitchens. Their love for cookies, however, straddles both home preparation (from a mix) and store bought. Snack departments should reflect their preference for potato chips over corn chips or snack cakes.

Don't ask why, but stores whose clientele skews towards college graduates will find *frozen* orange moving fast, while others do well with *refrigerated* and *canned* orange juice. The frozens category as a whole, however, performs poorly in this market. Especially corn on the cob; perhaps it's an etiquette problem.

BABY PRODUCTS

Cotton swabs	+31
Baby powder	+27
Baby oil	+22
Baby ointment	+12
Bar soap for babies	+12
Teething remedies	−22
Infant cereal	−26
Children's cough syrup	−32
Vitamins for children	−32
Prepared infant formula	−61

BREAKFAST FOODS/BAKED GOODS

English muffins	+124
Stuffing mixes/products	+36
Jams/jellies	+13
Table syrup/molasses	+6
Peanut butter	+5
Honey	−1
Bread	−7
Breakfast/snack bars	−20
Waffle/pancake mix	−24
Breakfast cereals (hot)	−26

ENTERTAINMENT BEVERAGES

Ale	+139
Imported dinner table wine	+92
Port, sherry/dessert wine	+82
Cordials and liqueurs	+67
Imported beer	+57
Brandy & cognac	+8
Domestic regular beer	−5
Soft drinks (ex. diet, cola)	−11
Sangria/pop/party wine	−25
Reg. colas (not diet)	−34

OTHER BEVERAGES

Instant iced tea mix	+66
Instant coffee (reg)	+36
Grapefruit juice	+33
Instant coffee (decaf)	+30
Drink additives	+22
Dry milk	−6
Ground coffee	−9
Non-dairy cream subs.	−16
Powdered soft drinks	−21
Instant tea	−37

CANDY & SNACKS

Cookies	+44
Crackers	+16
Potato chips	+11
Hard roll candy	+9
Nuts	+6
Packages mini. candy bars	−12
Pretzels	−13
Corn/tortilla chips/snacks	−19
Chewing gum	−20
Snack cakes	−27

DESSERTS

Brownie/cookie mixes	+60
Baking mixes	+8
Whipped topping	−5
Instant powdered pudding	−8
Dry cake mixes	−11
Frosting/frosting mixes	−12
Canned puddings/fillings	−13
Flavored gelatin desserts	−13
Granulated sugar	−14
Flour	−17

DAIRY

Orange juice (not frozen)	+56
Butter	+43
Yogurt	+34
Spread cheese	+13
Natural or imported cheese	+11
Cottage cheese	−10
Refrig. dough products	−20
Ready-to-serve dips	−22
Eggs	−31
Shortening	−47

FROZEN FOODS

Vegetables	+34
Waffles/pancakes/fr. toast	+26
Poultry	+6
Orange juice	+1
Ice cream/ice milk/sherb.	−5
Potato products	−10
Fish/seafood	−12
Pizza	−17
Complete dinners	−33
Corn on the cob	−61

Source: Mediamark Research Inc.

BOSTON

Opportunities for merchandising combinations are abundant here. The popularity of pasta and sauces extends beyond the city's traditionally Italian neighborhoods. And casseroles prepared from either ham or tuna in combination with a rice mix should also win shopper attention.

With the exception of a few disposable items, almost all paper products are popular with shoppers here. Large departments do expectedly well in trading areas with an above-average proportion of **large** households. Household cleaners tend to have far greater appeal than laundry products.

This cradle of Academe splits its pet ownership by educational accomplishment—of the petowners, that is. Cats live by and large with the college educated, and dogs with those who stopped at high school. Caring for one's own auto is not a favored leisuretime activity. Supers might give more room to reading centers and photo supplies.

An in-depth selection of remedies in supermarket HBA sections doesn't seem justified. All (including several not shown here) show usage levels below the national average. Women's HBA is also problematic, including almost every type of cosmetic and hair care product. A judicious selection of the fastest movers may be the answer.

Men's HBA products also show a general softness. College-age men tend to be slow buyers in this category, except for a few products like complexion care products, shampoo and deodorants. Cigarette smoking is more prevalent here than in the other 10 markets, particularly among those between 25 and 54.

PACKAGED VEGETABLES/FRUITS/MEATS/PREPARED MEALS

Deviled ham	+ 77
Flavored/seasoned rice mix	+ 63
Ham, canned	+ 42
Tuna, canned	+ 39
Hashes, canned	+ 32
Bacon	– 21
Pork sausage	– 29
Evaporated milk	– 41
Cold cuts, packaged	– 48
Mexican foods	– 72

SEASONINGS, CONDIMENTS & SAUCES

Extracts	+ 44
Cooking mixes	+ 43
Pasta, packaged	+ 41
Spaghetti sauce	+ 41
Soy sauce	+ 27
Gravy/sauce mixes	+ 1
Mayo./mayo.-type dressing	– 3
Salad or cooking oil	– 18
Catsup	– 26
Bottled BBQ/seasoning sauce	– 29

PAPER & PLASTIC PRODUCTS

Facial tissues	+ 41
Paper napkins	+ 34
Paper towels	+ 27
Plastic garbage bags/liners	+ 24
Plastic sandwich/food bags	+ 22
Toilet paper	+ 7
Aluminum foil	– 3
Disposable diapers	– 7
Disposable plates	– 8
Disposable household wipes	– 11

HOUSEHOLD & CLEANING PRODUCTS

Metal polish	+ 47
Cellophane tape	+ 28
Scouring pads	+ 27
Household cleaners	+ 17
Dishwashing liquid	+ 16
In-bowl toilet cleaners	– 18
Fabric softeners	– 20
Laundry presoaks	– 24
Drain cleaners	– 32
Roach traps	– 89

PET PRODUCTS

Canned cat food	+ 46
Dog biscuits/treats	+ 43
Packaged moist cat food	+ 41
Cat litter	+ 32
Canned dog food	+ 14
Flea/tick care products	– 1
Packaged dry cat food	– 4
Packaged dry dog food	– 25
Packaged moist dog food	– 27

GENERAL MERCHANDISE

Indoor plant food	+ 41
Photography	+ 27
Sunglasses	+ 26
Books/magazines	+ 23
Lawn seed	+ 21
Motor oil	– 11
Car wax/polish	– 13
Car batteries	– 15
Air filters, auto	– 16
Motor oil additives	– 24

HBA—ADULTS

Suntan/sunscreen products	+ 25
Talcum powder	+ 24
Insect repellents	+ 20
Cough syrup	+ 16
Toothpaste	+ 15
Diarrhea remedies	– 18
Hemorrhoid remedies	– 26
Eye wash/drops	– 27
Laxatives	– 33
Athlete's foot remedies	– 38

HBA—WOMEN

Disposable razors	+ 14
Depilatories	+ 14
Nail polish	+ 9
Sanitary napkins	+ 7
Shampoo	+ 6
Fem. hyg. douches/suppos.	– 32
Pressed powder	– 36
Loose face powder	– 41
Home permanents	– 47
Fem. hyg. deod. sprays	– 62

HBA—MEN

Shaving creams/gels	+ 18
Razor blades	+ 8
Shampoo	+ 5
Disposable razors	– 3
Hair coloring products	– 3
Hair conditioning treatment	– 28
Creme hair rinse	– 31
Hair sprays	– 37
Pre-electric shave lotion	– 37
Hair tonic/dressing	– 42

TOBACCO PRODUCTS

Cigarettes	+ 7
Cigars	+ 7
Disposable lighters	0
Pipe tobacco	– 15

Source: Mediamark Research Inc.

CHICAGO

Demographic Diversity Splinters Product Preference Patterns

The Chicago homemaker is more likely to have gone to college, to work part time or to be black than is the average U.S. homemaker. She often purchases products that can help save her time—such as disposables (household wipes and plates), frozens (waffles/pancakes/French toast, pizza, fish and main courses). When it comes to coffee, however, Chicagoans are above average in their predisposition to brew from ground rather than to add hot water to instant or freeze-dried. Usage of drain cleaners is higher than in any of the other nine markets.

OUTSTANDING DEMOGRAPHICS*
(Female Homemakers)

Graduated college	+18
Attended college	+13
Employed part-time	+32
1 person household	+11
5+ person household	+22
HH income $35,000 or more	+43
Black	+75

*Percent difference from total U.S.

NOTE: All figures represent percent difference (plus or minus) from total U.S.

Among the 10 markets, Chicago alone shows a rate of consumption of prepared infant formula substantially above the national average. Stores with a black clientele should be particularly alert to potential demand. The incidence of children under six in the household is topped only by Los Angeles and St. Louis.

With few exceptions, almost all kinds of beers, wines and alcoholic beverages show above average popularity here, as do soft drinks and mixers. Figures on coffee consumption patterns suggest the need to allocate a particularly generous amount of space to ground coffee vis-a-vis the instant varieties.

Chicago is the pre-eminent major market for meat sticks, with appeal related directly to age. The higher proportion of young customers a store has, the larger a variety of meat sticks is needed. Chicagoans show relatively little enthusiasm for preparing desserts at home.

Most major dairy categories exert a strong appeal to shoppers here. Spread cheese, cottage cheese and yogurt are strong candidates for promotions, including instore sampling. Usually showing more strength away from the major markets, frozen pizza is a Chicago favorite worthy of generous freezer space.

BABY PRODUCTS

Pre-moist cleansing wipes	+35
Prepared infant formula	+29
Baby foods	+25
Children's cough syrup	+19
Infant cereal	+18
Bar soap for babies	+3
Baby oil	+1
Baby ointment	+1
Teething remedies	0
Baby powder	−9

BREAKFAST FOODS/BAKED GOODS

English muffins	+25
Table syrup/molasses	+10
Jams/jellies	+9
Bread	+4
Breakfast/snack bars	+4
Peanut butter	−2
Breakfast cereals (hot)	−3
Breakfast cereals (cold)	−6
Toaster products	−7
Waffle/pancake mix	−8

ENTERTAINMENT BEVERAGES

Brandy & cognac	+47
Cordials & liqueurs	+40
Scotch whisky	+37
Champagne/sparkling wines	+31
Port/sherry/dessert wine	+30
Reg. colas (not diet)	+7
Domestic reg. beer	+7
Bottled water	−3
Light/low calorie beer	−3
Ale	−21

OTHER BEVERAGES

Grapefruit juice	+16
Misc. fruit juices/drinks	+15
Ground coffee	+10
Powdered soft drinks	+10
Instant iced tea mix	+8
Instant tea	−2
Instant coffee (decaf)	−3
Regular tea	−18
Instant coffee (reg)	−28
Dry milk	−32

CANDY & SNACKS

Pretzels	+34
Meat sticks	+17
Cookies	+16
Popcorn	+14
Crackers	+4
Hard roll candy	−2
Cough drops	−3
Regular size candy bars	−6
Corn/tortilla chips/snacks	−6
Nuts	−7

DESSERTS

Flavored gelatin desserts	+3
Whipped topping	+1
Canned puddings/fillings	0
Brownie/cookie mixes	0
Flour	−6
Baking mixes	−7
Granulated sugar	−8
Dry cake mixes	−13
Instant powdered pudding	−15

DAIRY

Spread cheese	+41
Butter	+30
Cottage cheese	+20
Yogurt	+18
Ready-to-serve dips	+12
Refrig. dough products	−3
American cheese	−4
Margarine	−7
Eggs	−8
Shortening	−30

FROZEN FOODS

Waffles/pancakes/Fr. toast	+32
Pizza	+30
Fish/seafood	+15
Main courses	+14
Corn on the cob	+12
Ice cream/ice milk/sherb.	+3
Complete dinners	−3
Vegetables	−4
Potato products	−5
Poultry	−9

Source: Mediamark Research Inc.

CHICAGO

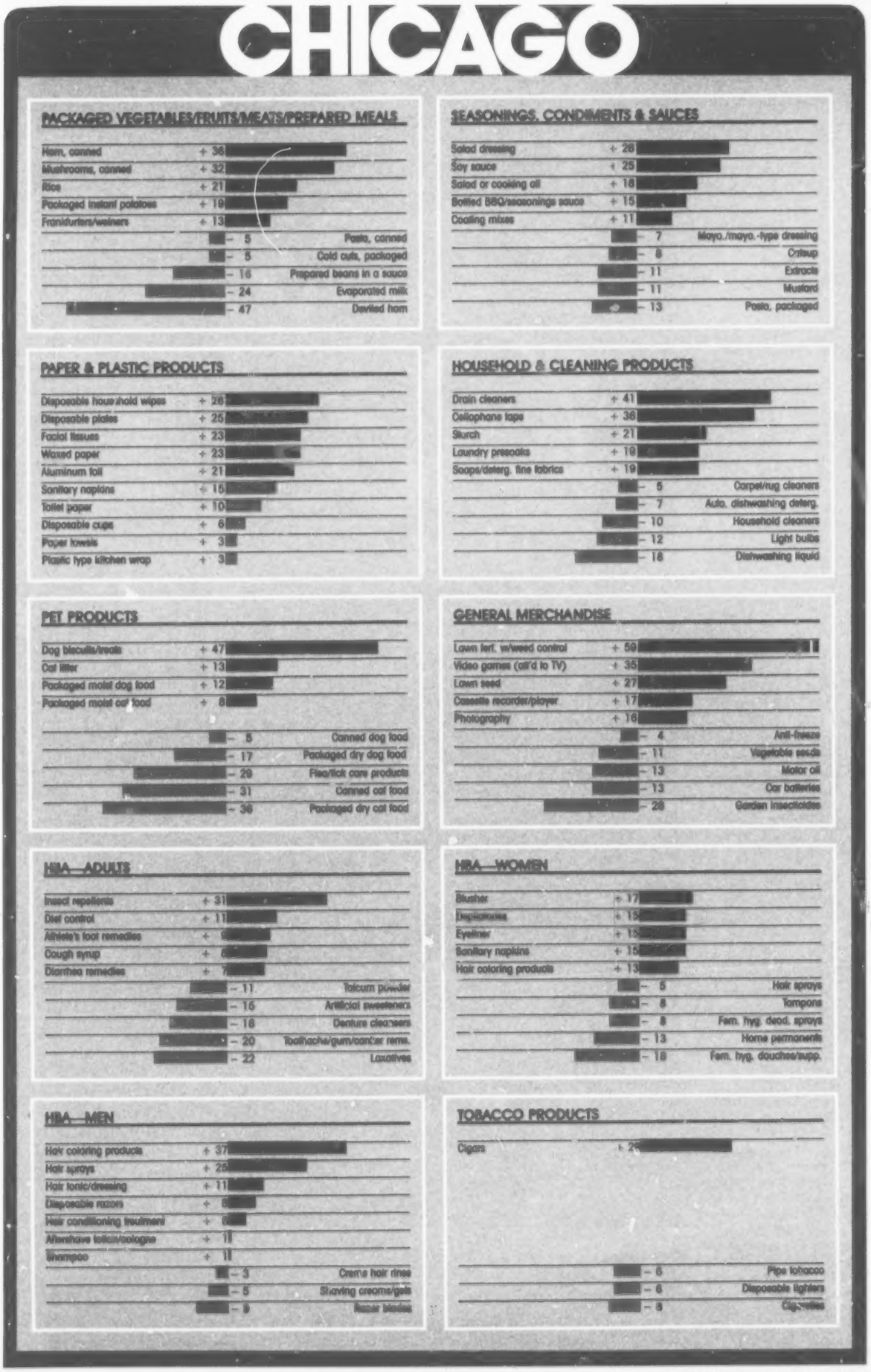
Specials on canned ham can anticipate a receptive audience, especially with middle aged and upper income shoppers. Strong summer promotions can be based on frankfurters/wieners, as well as on salad dressing and salad oil.

Consumption of all 14 types of products sold in the paper department (including four not shown) is above the national norm. Here is a section that needs (and deserves) plenty of space. Over in household and cleaning, drain cleaners show a strong constituency, as do three products used in the laundry.

Pet foods sell best here when there's a child between 12 and 17 in the house. This is especially true for dog biscuits and treats. Chicagoans appear to be somewhat indifferent to do-it-yourself auto upkeep, preferring to spend their time making sure that the grass is greener on their side of the fence.

Despite a few extremes at the high and low end of the spectrum, usage of most of the 27 adult HBA categories studied approximates the national average. The feminine hygiene products which have overall low appeal nevertheless merit adequate representation in sections patronized by black shoppers, with their reported higher usage.

Hair is the preoccupation of the Chicago male—coloring it, spraying it, dressing it and conditioning it—so he expects to find an adequate stock of hair products in his supermarket. Cigars evidence above average popularity here, as is true in most Midwest metropolitan areas.


PACKAGED VEGETABLES/FRUITS/MEATS/PREPARED MEALS
Ham, canned + 36
Mushrooms, canned + 32
Rice + 21
Packaged instant potatoes + 19
Frankfurters/weiners + 13
Pasta, canned – 5
Cold cuts, packaged – 5
Prepared beans in a sauce – 16
Evaporated milk – 24
Deviled ham – 47
SEASONINGS, CONDIMENTS & SAUCES
Salad dressing + 28
Soy sauce + 25
Salad or cooking oil + 18
Bottled BBQ/seasonings sauce + 15
Coating mixes + 11
Mayo./mayo.-type dressing – 7
Catsup – 8
Extracts – 11
Mustard – 11
Pasta, packaged – 13
PAPER & PLASTIC PRODUCTS
Disposable household wipes + 26
Disposable plates + 25
Facial tissues + 23
Waxed paper + 23
Aluminum foil + 21
Sanitary napkins + 15
Toilet paper + 10
Disposable cups + 6
Paper towels + 3
Plastic type kitchen wrap + 3
HOUSEHOLD & CLEANING PRODUCTS
Drain cleaners + 41
Cellophane tape + 36
Starch + 21
Laundry presoaks + 19
Soaps/deterg. fine fabrics + 19
Carpet/rug cleaners – 5
Auto. dishwashing deterg. – 7
Household cleaners – 10
Light bulbs – 12
Dishwashing liquid – 18
PET PRODUCTS
Dog biscuits/treats + 47
Cat litter + 13
Packaged moist dog food + 12
Packaged moist cat food + 8
Canned dog food – 5
Packaged dry dog food – 17
Flea/tick care products – 29
Canned cat food – 31
Packaged dry cat food – 36
GENERAL MERCHANDISE
Lawn fert. w/weed control + 59
Video games (att'd to TV) + 35
Lawn seed + 27
Cassette recorder/player + 17
Photography + 16
Anti-freeze – 4
Vegetable seeds – 11
Motor oil – 13
Car batteries – 13
Garden insecticides – 28
HBA—ADULTS
Insect repellents + 31
Diet control + 11
Athlete's foot remedies +
Cough syrup +
Diarrhea remedies +
Talcum powder – 11
Artificial sweeteners – 15
Denture cleaners – 16
Toothache/gum/canker rems. – 20
Laxatives – 22
HBA—WOMEN
Blusher + 17
Deodorants + 15
Eyeliner + 15
Sanitary napkins + 15
Hair coloring products + 13
Hair sprays – 5
Tampons – 8
Fem. hyg. deod. sprays – 8
Home permanents – 13
Fem. hyg. douches/supp. – 18
HBA—MEN
Hair coloring products + 37
Hair sprays + 25
Hair tonic/dressing + 11
Disposable razors +
Hair conditioning treatment +
Aftershave lotion/cologne +
Shampoo +
Creme hair rinse – 3
Shaving creams/gels – 5
Razor blades – 9
TOBACCO PRODUCTS
Cigars + 29
Pipe tobacco – 6
Disposable lighters – 6
Cigarettes – 8

Source: Mediamark Research Inc.

CLEVELAND

Traditional Consumption Patterns Keep Dry Grocery Robust

While its demographics approximate those of the country as a whole, Cleveland's style of consumption is distinctly its own. Dry grocery non-foods sections are favorites here, as evidenced by above average usage of paper and plastic products (including wraps and garbage bags) and of household and cleaning products (including several for the laundry). When it's time to relax after a hard day's work, a good cigar is often called for, along with a glass of ale and some pretzels.

OUTSTANDING DEMOGRAPHICS*

(Female Homemakers)	
45-54	+24
3-4 person household	+11
HH income $35,000 or more	+19
Black	+16

*Percent difference from total U.S.

NOTE: All figures represent percent difference (plus or minus) from total U.S.

Falling slightly short of the national average of households with tots to care for, Cleveland nevertheless shows a strong shopper response to baby HBA items, some of which cross over to adult usage. Breakfast sections merit plenty of space here, with products showing a catholicity of demand found nowhere else (although English muffins haven't made it yet).

End-aisle "ALE—SALE" displays could provoke a stampede here, with consumption more than twice the national average. Demand is strongest among the under 25's. A wide variety of non-alcoholic beverages perform well, with instant iced tea mix a surefire attention-getter for this summer's promotions.

Snack sections are a favorite for Clevelanders, with pretzels, popcorn, potato chips and corn chips all heavily bought. Another department which merits in-depth item selection is desserts, as various ingredients for home baking or mixes move well, as do pudding, gelatin and topping preparations.

The either/or pattern evidenced by butter and margarine is shattered in Cleveland as both show consumption significantly above the national average. Frozen main courses, or entrees, should be selected to reflect the upscale demographics of those who buy them most often here—the upper-income, college-educated one- or two-person household.

BABY PRODUCTS

Cotton swabs	+34
Bar soap for baby	+25
Baby oil	+17
Baby ointment	+13
Baby shampoo	+13
Disposable diapers	−7
Infant cereal	−9
Baby lotion	−10
Prepared infant formula	−18
Teething remedies	−22

BREAKFAST FOODS/BAKED GOODS

Stuffing mixes/products	+27
Jams/jellies	+23
Bread	+19
Breakfast cereals (hot)	+18
Peanut butter	+17
Breakfast cereals (cold)	+9
Breakfast/snack bars	+5
Toaster products	−1
Table syrup/molasses	−5
English muffins	−31

ENTERTAINMENT BEVERAGES

Ale	+116
Canadian whisky	+66
Rye or blended whisky	+42
Imported dinner table wine	+25
Soft drinks (ex. diet, cola)	+16
Port/sherry/dessert wine	−17
Sangria/pop/party wine	−19
Bottled water	−25
Imported beer	−30
Brandy & cognac	−46

OTHER BEVERAGES

Instant iced tea mix	+44
Non-dairy cream subs.	+30
Drink additives	+26
Instant coffee (reg.)	+22
Powdered soft drinks	+21
Instant coffee (decaf)	+11
Tomato/vegetable juices	+6
Grapefruit juice	−9
Regular tea	−14
Dry milk	−43

CANDY & SNACKS

Pretzels	+67
Popcorn	+23
Cookies	+16
Potato chips	+17
Corn/tortilla chips/snacks	+16
Packages of mint, candy bars	+1
Regular size candy bars	0
Nuts	−2
Snack cakes	−2
Cough drops	−7

DESSERTS

Canned puddings/fillings	+41
Whipped topping	+28
Flavored gelatin desserts	+21
Baking mixes	+19
Granulated sugar	+16
Flour	+6
Frosting/frosting mixes	+7
Instant powdered pudding	+3
Dry cake mixes	−1
Brownie/cookie mixes	−3

DAIRY

Margarine	+22
Cottage cheese	+22
Butter	+19
American cheese	+17
Natural or imported cheese	+14
Orange juice (not frozen)	+1
Yogurt	0
Spread cheese	−7
Shortening	−13
Eggs	−15

FROZEN FOODS

Main courses	+36
Ice cream/ice milk/sherb.	+26
Fish/seafood	+26
Potato products	+27
Waffles/pancakes/Fr. toast	+15
Poultry	+11
Orange juice	−4
Complete dinners	−9
Pizza	−21
Corn on the cob	−47

Source: Mediamark Research Inc.

CLEVELAND

Shoppers here have split personalities when it comes to shopping for prepacked dry grocery items. Most canned meats, along with Mexican foods, are anathema to them. A keener reception will be given to price specials on beans in a sauce, packaged dinners and that old combo—pasta and spaghetti sauce.

The entire dry grocery non-foods section of the supermarket is thoroughly shopped. Plastics, including wraps and bags for various uses, move well, and merit special promotional attention. Home laundry products also find their way onto most shopping lists here.

Clipping cents-off cat food coupons is a frequent activity, so staying aware of scheduled couponing in order not to disappoint customers is a priority. Cats are found mostly in three- or four-person households that include a teen. Garden supply sections are more likely to entice shoppers than are car care sections.

Breath fresheners sell better here than in any other of our markets, suggesting the urgency of giving them a prominent home of their own with room for a full selection of varieties. Women's traditional makeup and hair care products are in demand (Home permanents, by the way, are out of favor in this and all our other major markets.)

Cleveland men on the whole seem content to purchase the HBA basics, such as deodorants, shampoo and blades, and let it go at that. Stores which are heavily patronized by black men, however, should stock to meet their interest in hand and body creams, and hair conditioners, sprays and tonics.

PACKAGED VEGETABLES/FRUITS/MEATS/PREPARED MEALS

Mushrooms, canned	+ 38
Pork sausage	+ 32
Fruit, canned or jarred	+ 26
Prepared beans in a sauce	+ 26
Packaged dishes/dinners	+ 23
Evaporated milk	– 14
Mexican foods	– 40
Deviled ham	– 41
Hashes, canned	– 42
Ham, canned	– 70

SEASONINGS, CONDIMENTS & SAUCES

Cooking mixes	+ 35
Spaghetti sauce	+ 31
Pickles	+ 29
Extracts	+ 19
Pasta, packaged	+ 16
Gravy/sauce mixes	+ 6
Mayo./mayo.-type dressing	+ 5
Seasonings/spices	+ 3
Mustard	+ 3
Aerosol non-stick cook.	– 4

PAPER & PLASTIC PRODUCTS

Waxed paper	+ 82
Facial tissues	+ 29
Plastic-type kitchen wrap	+ 29
Plastic garbage bags/liners	+ 20
Disposable cups	+ 19
Sanitary napkins	+ 7
Toilet paper	+ 6
Disposable household wipes	+ 3
Aluminum foil	– 4
Disposable diapers	– 7

HOUSEHOLD & CLEANING PRODUCTS

Laundry presoaks	+ 48
Heavy-duty hand cleaners	+ 46
Fabric softeners	+ 31
Soaps/deterg. fine fabrics	+ 31
Drain cleaners	+ 26
Starch	+ 4
Auto. dishwashing deterg.	+ 3
Floor wax/polish	0
Oven cleaners	– 24
Roach traps	– 76

PET PRODUCTS

Packaged moist cat food	+ 47
Cat litter	+ 37
Dog biscuits/treats	+ 36
Canned cat food	+ 20
Packaged dry cat food	+ 18
Flea/tick care products	+ 14
Packaged dry dog food	+ 10
Packaged moist dog food	– 12
Canned dog food	– 16

GENERAL MERCHANDISE

Lawn fert. w/weed control	+ 51
Lawn seed	+ 43
Indoor plant food	+ 41
Flower seeds	+ 30
Car wax/polish	+ 24
Anti-freeze	+ 1
Motor oil	– 8
Cassette recorder/player	– 9
Sunglasses	– 10
Car batteries	– 12

HBA—ADULTS

Sunburn remedies	+ 23
Breath fresheners	+ 22
Toothache/gum/canker rems.	+ 15
Nasal sprays	+ 12
Insect repellents	+ 11
Talcum powder	– 13
Laxatives	– 16
Medicated throat lozenges	– 19
Athlete's foot remedies	– 19
Artificial sweeteners	– 22

HBA—WOMEN

Loose face powder	+ 26
Face creams/lotions	+ 25
Hair coloring products	+ 19
Hair care products	+ 17
Foundation makeup	+ 15
Complexion care products	– 8
Fem. hyg. douches/suppos.	– 8
Fem. hyg. deod. sprays	– 9
Hair setting products	– 12
Home permanents	– 18

HBA—MEN

Deods/anti perspirants	+ 6
Shampoo	+ 3
Razor blades	+ 2
Creme hair rinse	+ 2
Shaving creams/gels	– 2
Aftershave lotion/colognes	– 10
Pre-electric shave lotion	– 16
Hair conditioning treatment	– 20
Hair coloring products	– 24
Complexion care products	– 26

TOBACCO PRODUCTS

Cigars	+ 33
Pipe tobacco	0
Disposable lighters	– 1
Cigarettes	– 1

Source: Mediamark Research Inc.

DETROIT

Motown's Big Comeback Accelerates Sales of Smokes and Drinks

The incidence of black homemakers in Detroit is more than double the national average. Some products, including frozen pizza, frozen corn on the cob and canned pasta, produce usage rates here among blacks double that for whites. No products in the car care category show above average consumption, suggesting that workers seek other diversions, away from the assembly lines, which include lawn and garden care. Two departments which appear to fare poorly are pet and baby, with only dog biscuits and children's vitamins as standouts.

OUTSTANDING DEMOGRAPHICS*
(Female Homemakers)

Attended college	+16
Working full-time	+12
HH income $35,000 or more	+62
Single	+17
Black	+113

*Percent difference from total U.S.

NOTE: All figures represent percent difference (plus or minus) from total U.S.

The outlook for the baby needs department is dismal in Detroit, with most products showing consumption considerably below the national incidence. Hot breakfasts are popular here, with hot cereals selling better then in any other top market but Cleveland (with which it's tied).

While soft drinks and domestic beers sell at rates close to the national incidence, hard liquors are the strongest performers, giving supermarkets an opportunity to move bottled mixers. Sobersides show restrained enthusiasm for most coffee and tea varieties.

Candy and snack departments observe few major deviations from national patterns. The 18-to-34's comprise almost the entire market for meat sticks. Dessert making is not particularly popular here, although dry cake mixes prove an exception in larger households with children.

Both dips and cheese spreads attract shoppers to Detroit dairy departments. Dips show a patronage similar to that for crackers (suggesting dual merchandising), appealing to larger, upper income households. The heavy-breakfast habit suggested above extends to products available in the frozens section.

BABY PRODUCTS

Vitamins for children	+11
Cotton swabs	+5
Pre-moist. cleansing wipes	−2
Pain relievers/fever reduc.	−4
Baby oil	−5
Baby foods	−38
Baby powder	−44
Infant cereal	−51
Teething remedies	−65
Prepared infant formula	−57

BREAKFAST FOODS/BAKED GOODS

Breakfast cereals (hot)	+18
Waffle/pancake mix	+12
Stuffing mixes/products	+5
Bread	+4
English muffins	+2
Jams/jellies	−3
Breakfast/snack bars	−7
Peanut butter	−11
Toaster products	−13
Honey	−21

ENTERTAINMENT BEVERAGES

Brandy & cognac	+33
Scotch whisky	+26
Champagne/sparkling wine	+21
Rye or blended whisky	+17
Cordials & liqueurs	+17
Diet cola drinks	−14
Imported beer	−15
Ale	−25
Sangria/pop/party wine	−26
Bottled water	−56

OTHER BEVERAGES

Grapefruit juice	+28
Powdered soft drinks	+11
Non-dairy cream subs.	+9
Instant coffee (decaf)	+4
Instant iced tea mix	+2
Tomato/vegetable juices	−8
Instant coffee (reg)	−9
Dry milk	−12
Instant tea	−20
Regular tea	−28

CANDY & SNACKS

Hard roll candy	+9
Meat sticks	+5
Chewing gum	+4
Pretzels	+3
Mints	+3
Potato chips	−3
Corn/tortilla chips/snacks	−3
Crackers	−7
Packages of mini. candy bars	−7
Snack cakes	−12

DESSERTS

Dry cake mixes	+7
Flour	−2
Frosting/frosting mixes	−2
Whipped topping	−4
Flavored gelatin desserts	−6
Instant powdered pudding	−8
Canned puddings/fillings	−8
Granulated sugar	−10
Baking mixes	−13
Brownie/cookie mixes	−28

DAIRY

Ready-to-serve dips	+17
Butter	+16
Spread cheese	+10
American cheese	+4
Cottage cheese	+1
Margarine	−9
Yogurt	−11
Orange juice (not frozen)	−12
Eggs	−14
Refrig. dough products	−15

FROZEN FOODS

Waffles/pancakes/Fr. toast	+37
Main courses	+18
Poultry	+9
Orange juice	+4
Complete dinners	0
Potato products	−2
Ice cream/ice milk/sherb.	−6
Vegetables	−7
Corn on the cob	−37
Pizza	−57

Source: Mediamark Research Inc.

DETROIT

Canned entrees, such as pasta and beans in a sauce, are popular, although most canned meats aren't. Both products have their greatest franchise among homemakers who did not complete high school. Soy sauce sells well here, as it does in most metropolitan areas.

Disposable cups and plates both present good merchandising potential here. The standout, however, is plastic bags and liners, the usage of which is highest of the 10 major markets. Large households are, expectedly, the heaviest users.

Pet departments may be of comparatively modest dimensions here to stay in proportion to demand. Neither dogs nor cats have a strong franchise. Over in the GM department, lawn supplies offer a seasonal merchandising opportunity. After a day on the assembly line, Motown workers seem little inclined toward home car care.

Demand for various remedies is not particularly robust here, with many below the national norms of usage. With a few exceptions, women's HBA is also comparatively lackluster, with most cosmetic and hair prep categories showing little luster.

Men's hair care products show plenty of vitality here, so the section deserves an extra bit of attention in space allocation, especially in stores with a young customer mix. Of the 10 markets studied here, Detroit offers the best potential for smokes. A full assortment of cigarette brands is a must.

PACKAGED VEGETABLES/FRUITS/MEATS/PREPARED MEALS

Mushrooms, canned	+ 32
Pork sausage	+ 17
Pasta, canned	+ 12
Prepared beans in a sauce	+ 10
Frankfurters/weiners	+ 7
Rice	– 12
Hashes, canned	– 15
Packaged dishes/dinners	– 18
Ham, canned	– 44
Deviled ham	– 55

SEASONINGS, CONDIMENTS & SAUCES

Soy sauce	+ 21
Gravy/sauce mixes	+ 17
Pickle relish	+ 16
Salad dressing	+ 12
Pickles	+ 12
Pasta, packaged	– 1
Mayo./maya.-type dressing	– 6
Catsup	– 9
Aerosol non-stick cook.	– 11
Mustard	– 12

PAPER & PLASTIC PRODUCTS

Plastic garbage bags/liners	+ 32
Facial tissues	+ 20
Plastic sandwich/food bags	+ 12
Disposable plates	+ 10
Disposable cups	+ 10
Aluminum foil	– 4
Waxed paper	– 5
Paper towels	– 7
Disposable household wipes	– 15
Disposable diapers	– 22

HOUSEHOLD & CLEANING PRODUCTS

Drain cleaners	+ 31
Laundry presoaks	+ 31
Scouring pads	+ 20
Window cleaners	+ 19
Starch	+ 14
Furniture polish	– 13
Soap/deterg. fine fabrics	– 15
Dishwashing liquid	– 20
Bar soap	– 21
Roach traps	– 65

PET PRODUCTS

Dog biscuits/treats	+ 13
Packaged moist dog food	+ 1
Flea/tick care products	– 8
Packaged dry dog food	– 12
Canned dog food	– 26
Cat litter	– 29
Packaged moist cat food	– 40
Canned cat food	– 45
Packaged dry cat food	– 55

GENERAL MERCHANDISE

Lawn fert. w/weed control	+ 66
Lawn seed	+ 28
Video games (att'd to TV)	+ 19
Batteries	+ 10
Flower seeds	+ 10
Hand held or pocket calc.	– 9
Ball point pens	– 12
Indoor plant food	– 18
Garden insecticides	– 23
Car batteries	– 27

HBA—ADULTS

Insect repellents	+ 26
Breath fresheners	+ 9
Denture cleaners	+ 7
Athlete's foot remedies	+ 4
Cold/sinus/allergy remedies	+ 4
Talcum powder	– 18
Hemorrhoid remedies	– 20
Nasal sprays	– 20
Artificial sweeteners	– 24
Toothache/gum/carrier rems.	– 33

HBA—WOMEN

Depilatories	+ 29
Hair coloring products	+ 17
Nail polish	+ 17
Eyeliner	+ 13
Sanitary napkins	+ 5
Hair setting products	– 11
Home permanents	– 15
Loose face powder	– 15
Tampons	– 17
Fem. hyg. dead. sprays	– 21

HBA—MEN

Hair tonic/dressing	+ 17
Hair sprays	+ 16
Hair conditioning treatment	+ 15
Hair coloring products	+ 3
Disposable razors	0
Aftershave lotion/cologne	– 4
Creme hair rinse	– 4
Deodorants/anti perspirants	– 4
Shaving creams/gels	– 5
Pre-electric shave lotion	– 8

TOBACCO PRODUCTS

Cigars	+ 50
Disposable lighters	+ 12
Cigarettes	+ 9
Pipe tobacco	– 15

Source: Mediamark Research Inc.

LOS ANGELES

People Pick Products to Pamper Their Pets and Their Profiles

The incidence of Spanish-speaking homemakers here is three times the national average. Therefore, the outstanding performance of Mexican foods, and of corn and tortilla chips and snacks, is no surprise. This crossroads of world-famous faces spends both time and money making faces look their best, as evidenced by the five cosmetics that top the product list for women's HBA. Bottled water has virtually achieved commodity status here, supplemented by domestic wines and imported beers. Yogurt's popularity is greater only in New York and San Francisco.

OUTSTANDING DEMOGRAPHICS*
(Female Homemakers)

35-44	+12
Attended college	+50
Working full time	+12
1 person household	+18
HH income $35,000 or more	+32
Marital status—other**	+10
Spanish speaking	+321

*Percent difference from total U.S.
**Not married or single.

NOTE: All figures represent percent difference (plus or minus) from total U.S.

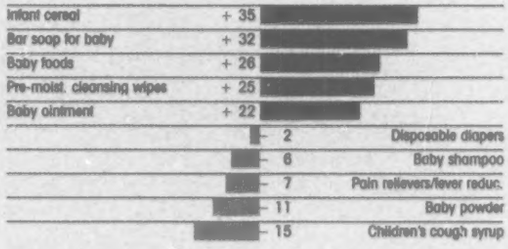
Incidence of children under six in households is highest of the 10 markets, at eight percent above the national average. Baby foods and cereals spearhead this vibrant section. In the breakfast aisle there's more interest in breakfast/snack bars than in any of our other markets.

Local conditions incite a demand of floodlike proportions for bottled water, and outsized water sections are common. Almost all party beverages sell well, including Scotch, vodka and diet soft drinks (not shown). Juices and drinks sections appear to generate plenty of shopper interest. When it's time for a hot beverage, instant or freeze-dried coffee is the choice.

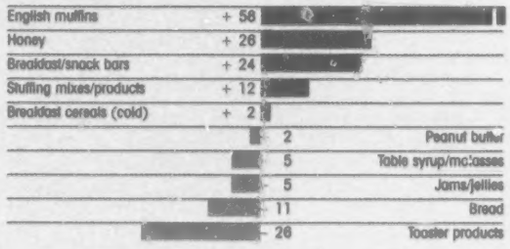
The kingpins of L.A. snack sections are corn/tortilla chips/snacks and nuts. Other snacks and most kinds of candy (not shown) suffer from slack demand. The L.A. lifestyle doesn't include a lot of time in the kitchen baking or cooking up desserts as evidenced by low demand for ingredients.

Diet-conscious Angelenos head for the yogurt selection in the dairy case. Its appeal is highest among homemakers 25 to 44 and those working full time. Cottage cheese, a diet staple, also excels. Spread over many age and income groups (but shining in one-person households) frozen main courses are an asset in any store.

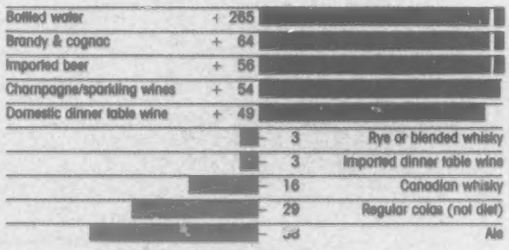
BABY PRODUCTS


Infant cereal + 35
Bar soap for baby + 32
Baby foods + 26
Pre-moist. cleansing wipes + 25
Baby ointment + 22
- 2 Disposable diapers
- 6 Baby shampoo
- 7 Pain relievers/fever reduc.
- 11 Baby powder
- 15 Children's cough syrup

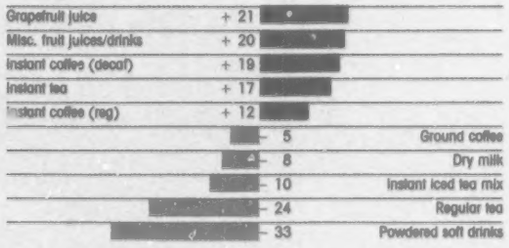
BREAKFAST FOODS/BAKED GOODS



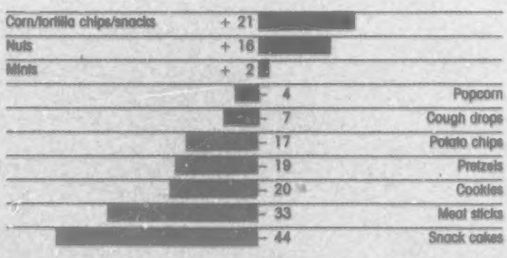
ENTERTAINMENT BEVERAGES


Bottled water + 265
Brandy & cognac + 64
Imported beer + 56
Champagne/sparkling wines + 54
Domestic dinner table wine + 49
- 3 Rye or blended whisky
- 3 Imported dinner table wine
- 16 Canadian whisky
- 29 Regular colas (not diet)
- Ale

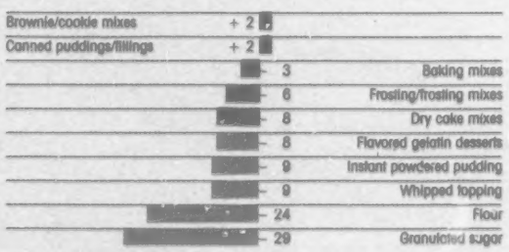
OTHER BEVERAGES


Grapefruit juice + 21
Misc. fruit juices/drinks + 20
Instant coffee (decaf) + 19
Instant tea + 17
Instant coffee (reg) + 12
- 5 Ground coffee
- 8 Dry milk
- 10 Instant iced tea mix
- 24 Regular tea
- 33 Powdered soft drinks

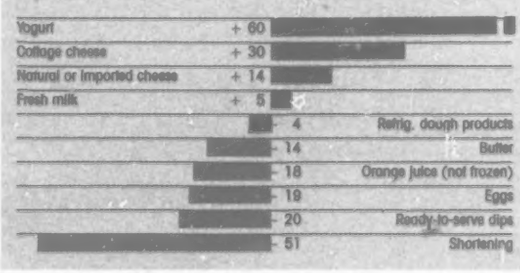
CANDY & SNACKS



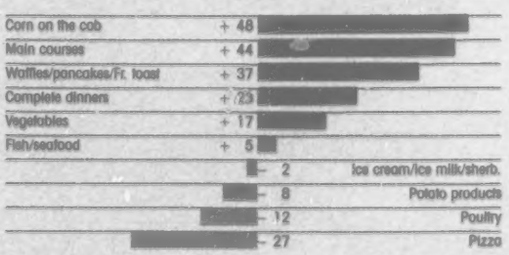
DESSERTS


Brownie/cookie mixes + 2
Canned puddings/fillings + 2
- 3 Baking mixes
- 6 Frosting/frosting mixes
- 8 Dry cake mixes
- 8 Flavored gelatin desserts
- 9 Instant powdered pudding
- 9 Whipped topping
- 24 Flour
- 29 Granulated sugar

DAIRY


Yogurt + 60
Cottage cheese + 30
Natural or imported cheese + 14
Fresh milk + 5
- 4 Refrig. dough products
- 14 Butter
- 18 Orange juice (not frozen)
- 19 Eggs
- 20 Ready-to-serve dips
- 51 Shortening

FROZEN FOODS



Source: Mediamark Research Inc.

LOS ANGELES

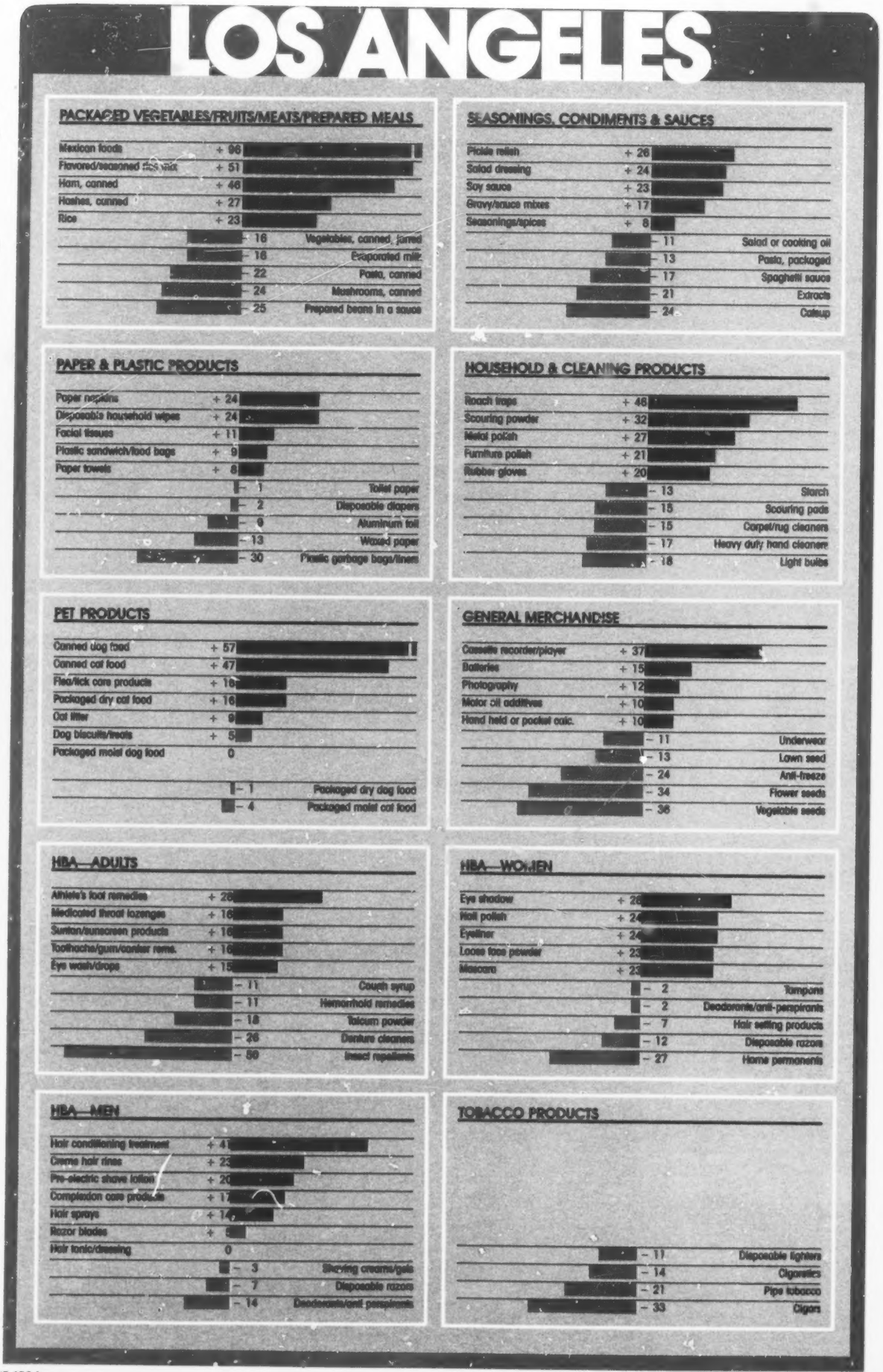
The spectacular performance of Mexican foods isn't explained only by the large population here with Mexican roots. This cuisine has been assimilated by all kinds of households both when eating out and at home. By comparison, pasta and spaghetti sauce have less appeal in L.A. than elsewhere.

With the exception of some kitchen wraps and plastic bags/liners, most products found in the paper section perform well here. When featured, both napkins and disposable wipes would sell well. In this year-round warm climate, roaches seem to be a constant enemy in many households, supporting a demand for products to control them.

Pets fit in with the Southern California lifestyle, and they consume a great deal of canned pet food. Sales are best in family neighborhoods with large (human) households. Listening to music from cassettes, which are in demand, helps break the tedium of the freeways. GM sections shouldn't overlook photo supplies either.

The outdoor life brings with it a need for products for protection from the sun (not just a seasonal in and out here) and for athlete's foot remedies. L.A.'s preeminence in movie and television—along with a general preoccupation with looking good—explains the outsized demand for cosmetics.

The L.A. male, especially if he's young, shops frequently for hair conditioning and creme rinse products. (Tonics/dressings are favored by older men.) The best prospects for cigarette sales are 18 to 24's and singles. Disposable lighters expectedly follow the same pattern.


PACKAGED VEGETABLES/FRUITS/MEATS/PREPARED MEALS
Mexican foods + 96
Flavored/seasoned rice mix + 51
Ham, canned + 46
Hashes, canned + 27
Rice + 23
Vegetables, canned, jarred – 16
Evaporated milk – 16
Pasta, canned – 22
Mushrooms, canned – 24
Prepared beans in a sauce – 25
SEASONINGS, CONDIMENTS & SAUCES
Pickle relish + 26
Salad dressing + 24
Soy sauce + 23
Gravy/sauce mixes + 17
Seasonings/spices + 8
Salad or cooking oil – 11
Pasta, packaged – 13
Spaghetti sauce – 17
Extracts – 21
Catsup – 24
PAPER & PLASTIC PRODUCTS
Paper napkins + 24
Disposable household wipes + 24
Facial tissues + 11
Plastic sandwich/food bags + 9
Paper towels + 8
Toilet paper – 1
Disposable diapers – 2
Aluminum foil – 9
Waxed paper – 13
Plastic garbage bags/liners – 30
HOUSEHOLD & CLEANING PRODUCTS
Roach traps + 46
Scouring powder + 32
Metal polish + 27
Furniture polish + 21
Rubber gloves + 20
Starch – 13
Scouring pads – 15
Carpet/rug cleaners – 15
Heavy duty hand cleaners – 17
Light bulbs – 18
PET PRODUCTS
Canned dog food + 57
Canned cat food + 47
Flea/tick care products + 18
Packaged dry cat food + 16
Cat litter + 9
Dog biscuits/treats + 5
Packaged moist dog food 0
Packaged dry dog food – 1
Packaged moist cat food – 4
GENERAL MERCHANDISE
Cassette recorder/player + 37
Batteries + 15
Photography + 12
Motor oil additives + 10
Hand held or pocket calc. + 10
Underwear – 11
Lawn seed – 13
Anti-freeze – 24
Flower seeds – 34
Vegetable seeds – 36
HBA—ADULTS
Athlete's foot remedies + 26
Medicated throat lozenges + 16
Suntan/sunscreen products + 16
Toothache/gum/canker rems. + 16
Eye wash/drops + 15
Cough syrup – 11
Hemorrhoid remedies – 11
Talcum powder – 18
Denture cleaners – 26
Insect repellents – 59
HBA—WOMEN
Eye shadow + 26
Nail polish + 24
Eyeliner + 24
Loose face powder + 23
Mascara + 23
Tampons – 2
Deodorants/anti-perspirants – 2
Hair setting products – 7
Disposable razors – 12
Home permanents – 27
HBA—MEN
Hair conditioning treatment + 41
Creme hair rinse + 23
Pre-electric shave lotion + 20
Complexion care products + 17
Hair sprays + 14
Razor blades + 5
Hair tonic/dressing 0
Shaving creams/gels – 3
Disposable razors – 7
Deodorants/anti-perspirants – 14
TOBACCO PRODUCTS
Disposable lighters – 11
Cigarettes – 14
Pipe tobacco – 21
Cigars – 33

Source: Mediamark Research Inc.

PHILADELPHIA

Ale's Well in Philadelphia, as is the Paper Goods Department

The incidence of homemakers who have attended and/or graduated from college is the lowest of the 10 markets. A concomitant to this is an age curve which skews toward the high end. As a general product class, HBA shows relatively few bright spots (five products for men's hair care are significantly below average). Two products where Philadelphians' preferences stand out on the plus side are ale and pretzels. Another winning combination is packaged pasta and spaghetti sauce. A variety of paper products is in above-average demand.

OUTSTANDING DEMOGRAPHICS*
(Female Homemakers)

45-54	+15
55-64	+17
Graduated high school	+17
Working part time	+23
Not employed	+11
5+ persons household	+14
HH income $35,000 or more	+19
Black	+46

*Percent difference from total U.S.

NOTE: All figures represent percent difference (plus or minus) from total U.S.

In line with the above average age of homemakers here, babies are comparatively scarce and sales of baby products languid (except for baby powder, which is also used by adults). Hot breakfasts—such as hot cereals and pancakes/waffles—aren't popular. English muffin with some jelly is.

This is the #1 ale market among our 10, so this product shouldn't be overlooked in selecting participants for end-aisle displays. Reaction will be greatest where there are lots of young, male, college-educated shoppers. Instant coffee and iced tea mix are heavily purchased.

In that end-aisle ale display, you might want to find room for Philadelphia's favorite snack—pretzels. Other snack section items have less selling fire. While pudding and brownie/cookie mixes are purchased, there's less interest in assembling ingredients like flour and sugar for scratch baking.

Nationwide, margarine users outnumber butter users substantially, but here butter scores by a six to four margin. Butter use increases in line with educational attainment. The spectrum of frozen foods use is wide enough to include components for breakfast, main courses and desserts.

BABY PRODUCTS

Baby powder	+25
Vitamins for children	+2
Cotton swabs	+2
Children's cough syrup	-2
Baby foods	-3
Bar soap for baby	-18
Teething remedies	-20
Baby oil	-27
Baby lotion	-30
Prepared infant formula	-31

BREAKFAST FOODS/BAKED GOODS

English muffins	+53
Stuffing mixes/products	+15
Breakfast cereals (cold)	+12
Breakfast/snack bars	+8
Jams/jellies	+8
Peanut butter	-6
Waffle/pancake mix	-6
Toaster products	-10
Breakfast cereals (hot)	-13
Table syrup/molasses	-14

ENTERTAINMENT BEVERAGES

Ale	+156
Imported dinner table wine	+50
Port/sherry/dessert wine	+38
Gin	+34
Cordials and liqueurs	+33
Sangria/pop/party wine	-4
Diet cola drinks	-8
Reg. colas (not diet)	-8
Rum	-11
Light/low calorie beer	-19

OTHER BEVERAGES

Instant iced tea mix	+67
Instant coffee (reg)	+24
Instant coffee (decaf)	+20
Grapefruit juice	+19
Misc. fruit juices/drinks	+14
Non-dairy cream subs.	0
Ground coffee	-9
Drink additives	-11
Powdered soft drinks	-11
Instant tea	-34

CANDY & SNACKS

Pretzels	+139
Cookies	+43
Snack cakes	+36
Hard roll candy	+21
Cough drops	+13
Nuts	0
Potato chips	-5
Chewing gum	-5
Corn/tortilla chips/snacks	-24
Popcorn	-31

DESSERTS

Brownie/cookie mixes	+8
Instant powdered pudding	+7
Flavored gelatin desserts	+7
Canned puddings/fillings	+2
Dry cake mixes	0
Frosting/frosting mixes	-9
Whipped topping	-11
Flour	-12
Granulated sugar	-12
Baking mixes	-14

DAIRY

Butter	+72
Yogurt	+27
Orange juice (not frozen)	+20
Spread cheese	+7
American cheese	+4
Ready-to-serve dips	-17
Margarine	-26
Cottage cheese	-26
Refrig. dough products	-27
Shortening	-43

FROZEN FOODS

Vegetables	+102
Waffles/pancakes/Fr. toast	+42
Fish/seafood	+25
Orange juice	+14
Ice cream/ice milk/sherb.	+12
Pizza	+1
Poultry	-1
Complete dinners	-10
Potato products	-12
Corn on the cob	-28

Source: Mediamark Research Inc.

PHILADELPHIA

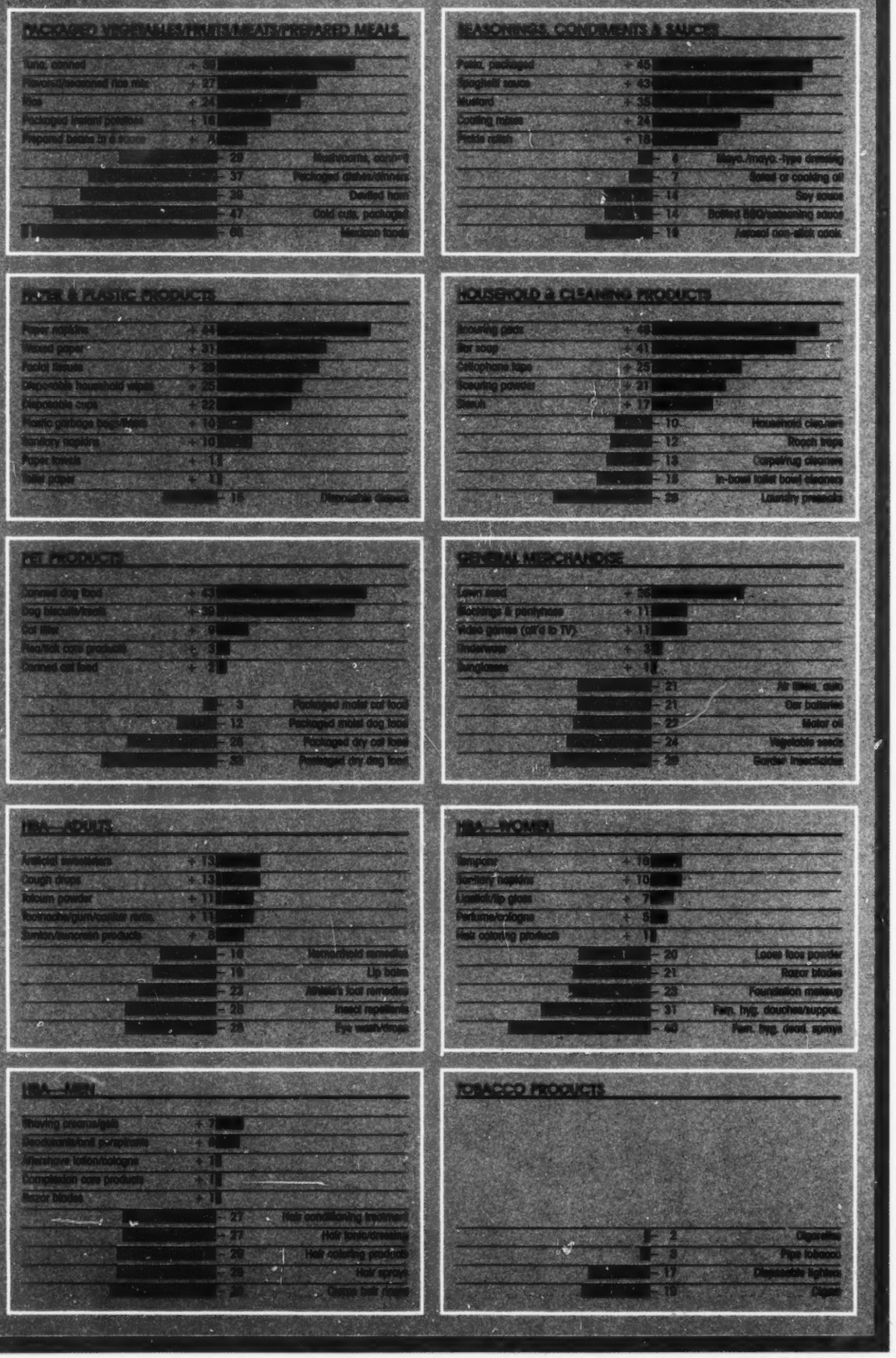
The dry grocery-food departments offer many popular items which could be included in weekly specials to incite shopper interest—especially canned tuna, rice and rice mixes, instant potatoes, mustard, and that standby but standout merchandising combo: pasta and spaghetti sauce.

"The Paper Chase" might well have been named for the behavior of Philadelphia shoppers. They show above average purchase of every type of product offered except for diapers. The importance of providing a spacious and well-stocked selection is obvious. Over in household, nitty-gritty products like scourers and laundry starch excel.

Dry and moist pet foods are overshadowed by canned varieties here. Upper-income households are the biggest buyers of canned. Few products offer special potential in general merchandise, but lawn seed, pantyhose and video games may perform if skillfully hyped.

Merchandisers for health and beauty aids might feel better themselves if they didn't have to contend with so many weak performers in both general and women's HBA. A few exceptions—like artificial sweeteners and cough drops—may even merit dual locations.

Philadelphia men leave their hair alone to a large degree, limiting the possibilities for merchandising men's hair products. Even younger men show little interest. Cigarette consumption is virtually in line with national patterns, so shoppers expect a wide variety of brands, types and sizes to be on hand.


PACKAGED VEGETABLES/FRUITS/MEATS/PREPARED MEALS
Tuna, canned + 59
Rice + 24
Packaged instant potatoes + 16
Mushrooms, canned - 29
Packaged dishes/dinners - 37
Deviled ham - 39
Cold cuts, packaged - 47
Meatless foods - 66
SEASONINGS, CONDIMENTS & SAUCES
Pasta, packaged + 45
Spaghetti sauce + 43
Mustard + 33
Cooking raisins + 24
Pickle relish + 18
Mayo./mayo.-type dressing - 6
Salad or cooking oil - 7
Soy sauce - 14
Bottled BBQ/seasoning sauce - 14
Aerosol non-stick cook - 18
PAPER & PLASTIC PRODUCTS
Paper napkins + 44
Waxed paper + 31
Toilet tissue + 28
Disposable household wipes + 25
Disposable cups + 22
Plastic garbage bags/liners + 10
Sanitary napkins + 10
Paper towels + 1
Toilet paper + 1
Diapers, disposable - 16
HOUSEHOLD & CLEANING PRODUCTS
Scouring pads + 48
Bar soap + 41
Cellophane tape + 25
Scouring powder + 21
Starch + 17
Household cleaners - 10
Roach traps - 12
Carpet/rug cleaners - 13
In-bowl toilet bowl cleaners - 18
Laundry presoaks - 28
PET PRODUCTS
Canned dog food + 43
Dog biscuits/treats + 39
Cat litter + 9
Flea/tick care products + 3
Canned cat food + 2
Packaged moist cat food - 3
Packaged moist dog food - 12
Packaged dry cat food - 28
Packaged dry dog food - 33
GENERAL MERCHANDISE
Lawn seed + 36
Bushings & pantyhose + 11
Video games (off & to TV) + 11
Underwear + 3
Sunglasses + 1
Air fresh. auto - 21
Car batteries - 21
Motor oil - 23
Vegetable seeds - 24
Garden insecticides - 29
HBA—ADULTS
Artificial sweeteners + 13
Cough drops + 13
Talcum powder + 11
Bandache/gum/canker rems. + 11
Suntan/sunscreen products + 8
Home/shelf remedies - 16
Lip balm - 16
Athlete's foot remedies - 23
Insect repellents - 28
Eye wash/drops - 28
HBA—WOMEN
Tampons + 16
Sanitary napkins + 10
Lipstick/lip gloss + 7
Perfume/cologne + 5
Hair coloring products + 1
Loose face powder - 20
Razor blades - 21
Foundation makeup - 23
Fem. hyg. douches/suppos. - 31
Fem. hyg. deod. sprays - 40
HBA—MEN
Shaving creams/gels + 7
Deodorants/anti perspirants + 6
Aftershave lotion/cologne + 1
Complexion care products + 1
Razor blades + 1
Hair conditioning treatment - 27
Hair tonic/dressing - 27
Hair coloring products - 28
Hair sprays - 28
Dome hair rinses - 29
TOBACCO PRODUCTS
Cigarettes - 2
Pipe tobacco - 8
Disposable lighters - 17
Cigars - 19

Source: Mediamark Research Inc.

NEW YORK

An Aging Population Buys Briskly in Paper & Cleaner Aisles

While a market of 13.3 million adults can accommodate tastes for almost all kinds of products, New York—demographically differentiated by its older, non-working, live-alone homemakers—shows its own peaks and valleys of product usage. Incidence of drinking Scotch, for example, is double that of the nation as a whole. New Yorkers also covet English muffins, instant iced tea mix, pasta and frozen vegetables. Supermarket operators who want to give these products their due have probably made room by shrinking baking ingredients, not an activity of choice here.

OUTSTANDING DEMOGRAPHICS*

(Female Homemakers)	
45-54	+13
55-64	+10
65+	+11
Not employed	+12
1 person household	+25
HH income $35,000 or more	+35
Single	+16
Black	+25
Spanish speaking	+98

*Percent difference from total U.S.

NOTE: All figures represent percent difference (plus or minus) from total U.S.

Products used by *real* babies, such as disposable diapers and infant formula do poorly. What does sell are HBA products for baby that are often bought by adults for themselves. Many of these products merit dual placement in the baby and adult HBA sections.

BABY PRODUCTS

Baby powder	+ 21
Cotton swabs	+ 14
Baby shampoo	+ 11
Bar soap for babies	+ 6
Baby oil	+ 7
Children's cough syrup	– 11
Baby lotion	– 12
Prepared infant formula	– 12
Pain relievers/fever reduc.	– 13
Disposable diapers	– 14

BREAKFAST FOODS/BAKED GOODS

English muffins	+ 127
Honey	+ 30
Stuffing mixes/products	+ 17
Breakfast cereals (cold)	+ 9
Bread	+ 8
Breakfast cereals (hot)	– 6
Peanut butter	– 8
Table syrup/molasses	– 9
Toaster products	– 12
Breakfast/snack bars	– 15

New Yorkers are high on almost all types of party beverages. Their consumption pattern is below the national average for only three of 23 products included in this study. While supermarkets are still prohibited from selling spirits, they can effervesce sales by promoting drink mixers and bottled water.

ENTERTAINMENT BEVERAGES

Port/sherry/dessert wine	+ 120
Scotch whisky	+ 101
Ale	+ 95
Cordials and liqueurs	+ 88
Bottled water	+ 81
Domestic regular beer	+ 5
Reg. carbonated soft drinks	+ 2
Reg. colas (not diet)	– 9
Canadian whisky	– 24
Light/low calorie beer	– 32

OTHER BEVERAGES

Instant iced tea mix	+ 86
Instant coffee (decaf)	+ 42
Misc. fruit juices/drinks	+ 25
Grapefruit juice	+ 17
Regular tea	+ 15
Ground coffee	– 1
Non-dairy cream substitutes	– 26
Instant tea	– 30
Powdered soft drinks	– 42

With cookie and croissant shops becoming as common as DON'T WALK signs, there's relatively little interest in preparing desserts from scratch. In-store bakeries find a receptive clientele, and help draw traffic. But dessert ingredients—justifiably it appears—often draw cramped accomodations.

CANDY & SNACKS

Cookies	+ 58
Pretzels	+ 56
Hard roll candy	+ 25
Packages of mini. candy bars	+ 9
Cough drops	+ 4
Potato chips	– 10
Regular size candy bars	– 11
Meat sticks	– 19
Corn/tortilla chips/snacks	– 29
Popcorn	– 36

DESSERTS

Brownie/cookie mixes	+ 3
Flavored gelatin desserts	– 7
Instant powdered pudding	– 12
Frosting/frosting mixes	– 12
Dry cake mixes	– 12
Whipped topping	– 16
Granulated sugar	– 21
Baking mixes	– 22
Canned puddings/fillings	– 24
Flour	– 28

Space allocation in dairy departments doesn't always reflect the fact that New York is the only market where the spread between butter and margarine buyers is two to one (67.0 to 34.6). Frozen breakfast items are especially popular among suburbanites with large families.

DAIRY

Butter	+ 68
Yogurt	+ 71
Orange juice (not frozen)	+ 67
Natural or imported cheese	+ 11
Spread cheese	+ 7
Eggs	– 11
Refrig. dough products	– 23
Margarine	– 29
Ready-to-serve dips	– 30
Shortening	– 62

FROZEN FOODS

Vegetables	+ 86
Corn on the cob	+ 55
Waffles/pancakes/Fr. toast	+ 36
Orange juice	+ 10
Main courses	+ 7
Potato products	0
Fish/seafood	0
Ice cream/ice milk/sherb.	– 6
Pizza	– 14
Complete dinners	– 17

Source: Mediamark Research Inc.

NEW YORK

New York is the tuna consumption capital of the U.S.—no wonder it's so frequently featured in store promotions. Mexican foods sections have been gaining increased space in some area stores. At present their best customers tend to be young, better educated and upper income.

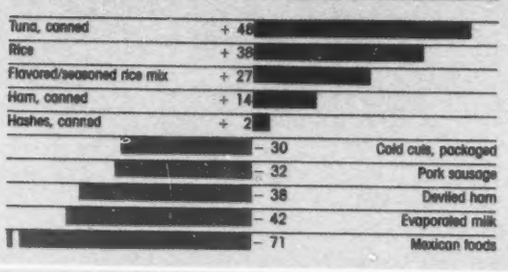
Paper and plastic departments are well patronized, with only a handful of products showing consumption patterns below the national norm. Plenty of space is justified here, as it is for the briskly patronized shelves that hold household and cleaning products. An exception is the sub-category of laundry products.

Leash laws or no, both dogs and cats maintain their privileged positions as members of millions of area households. Stores in black neighborhoods find little call for pet foods. Soft goods sections find a potential in both men's underwear and pantyhose, especially if they draw many working women customers.

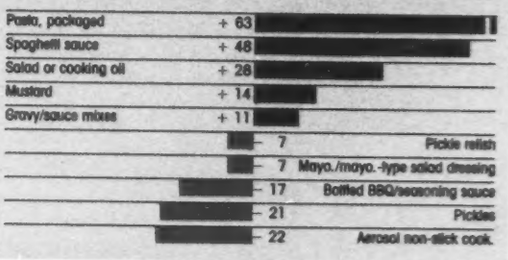
With their often cramped space, New York area supermarkets often have trouble serving their customers' HBA needs. Seasonal rotation could help make room for such favorites as cough syrup and suntan/sunscreen products. Few supermarkets here offer the types of cosmetic items that sell best.

In New York—as in Washington, D.C. and Chicago—only his barber knows for sure, as men's hair coloring products significantly exceed the national average. More mainstream favorites relate to shaving. Cigarettes sell best to those holding full-time jobs.

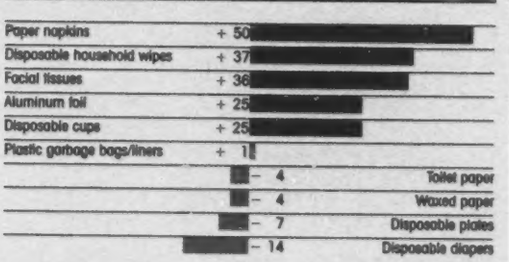
PACKAGED VEGETABLES/FRUITS/MEATS/PREPARED MEALS


Tuna, canned + 46
Rice + 38
Flavored/seasoned rice mix + 27
Ham, canned + 14
Hashes, canned + 2
Cold cuts, packaged – 30
Pork sausage – 32
Deviled ham – 38
Evaporated milk – 42
Mexican foods – 71

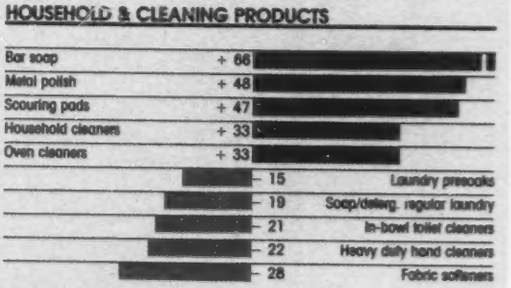
SEASONINGS, CONDIMENTS & SAUCES


Pasta, packaged + 63
Spaghetti sauce + 48
Salad or cooking oil + 28
Mustard + 14
Gravy/sauce mixes + 11
Pickle relish – 7
Mayo./mayo.-type salad dressing – 7
Bottled BBQ/seasoning sauce – 17
Pickles – 21
Aerosol non-stick cook. – 22

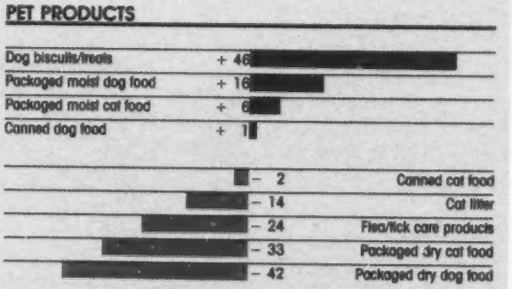
PAPER & PLASTIC PRODUCTS


Paper napkins + 50
Disposable household wipes + 37
Facial tissues + 36
Aluminum foil + 25
Disposable cups + 25
Plastic garbage bags/liners + 1
Toilet paper – 4
Waxed paper – 4
Disposable plates – 7
Disposable diapers – 14

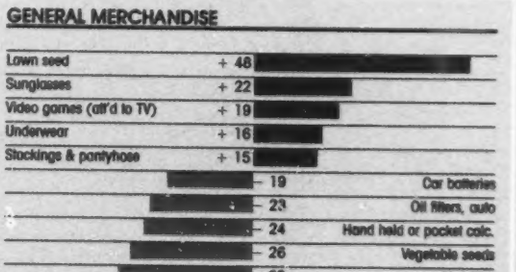
HOUSEHOLD & CLEANING PRODUCTS


Bar soap + 66
Metal polish + 48
Scouring pads + 47
Household cleaners + 33
Oven cleaners + 33
Laundry presoaks – 15
Soap/deterg. regular laundry – 19
In-bowl toilet cleaners – 21
Heavy duty hand cleaners – 22
Fabric softeners – 28

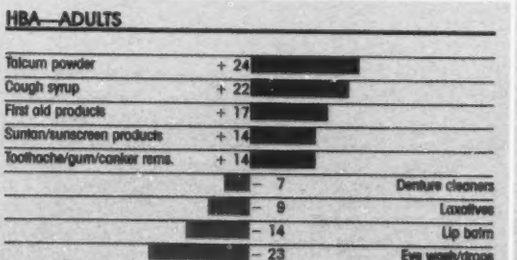
PET PRODUCTS


Dog biscuits/treats + 46
Packaged moist dog food + 16
Packaged moist cat food + 6
Canned dog food + 1
Canned cat food – 2
Cat litter – 14
Flea/tick care products – 24
Packaged dry cat food – 33
Packaged dry dog food – 42

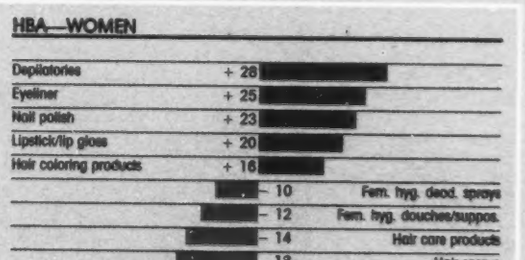
GENERAL MERCHANDISE


Lawn seed + 48
Sunglasses + 22
Video games (att'd to TV) + 19
Underwear + 16
Stockings & pantyhose + 15
Car batteries – 19
Oil filters, auto – 23
Hand held or pocket calc. – 24
Vegetable seeds – 26
Motor oil – 29

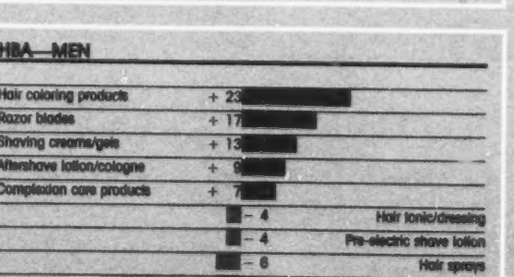
HBA—ADULTS


Talcum powder + 24
Cough syrup + 22
First aid products + 17
Suntan/sunscreen products + 14
Toothache/gum/canker rems. + 14
Denture cleaners – 7
Laxatives – 9
Lip balm – 14
Eye wash/drops – 23
Insect repellents – 25

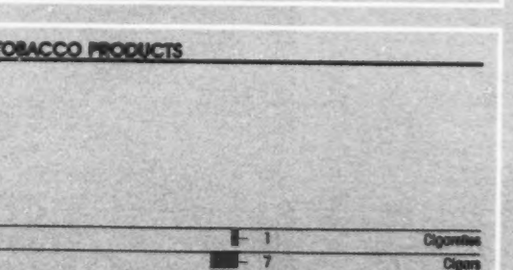
HBA—WOMEN


Depilatories + 28
Eyeliner + 25
Nail polish + 23
Lipstick/lip gloss + 20
Hair coloring products + 16
Fem. hyg. deod. sprays – 10
Fem. hyg. douches/suppos. – 12
Hair care products – 14
Hair sprays – 18
Home permanents – 22

HBA—MEN


Hair coloring products + 23
Razor blades + 17
Shaving creams/gels + 13
Aftershave lotion/cologne + 9
Complexion care products + 7
Hair tonic/dressing – 4
Pre-electric shave lotion – 4
Hair sprays – 6
Creme hair rinse – 6
Shampoo – 7

TOBACCO PRODUCTS



Source: Mediamark Research Inc.

SAN FRANCISCO

Wine & Cheese Prosper Together Like Bays & Bridges

Homemakers here have money to spend, partly from their participation in the professional/technical workforce area, or as managers and administrators. Two factors that facilitate this are their high educational attainments, and a below average incidence of children at home. Supermarkets here must provide ample space for display of wine as consumption is double the national average. Dessert preparation seems a lost art here, as many substitute a container of yogurt, with its health and convenience appeal.

OUTSTANDING DEMOGRAPHICS
(Female Homemakers)

18-24	+15
Graduated college	+50
Attended college	+41
Working full time	+12
Working part time	+17
1 person household	+10
HH income $35,000 or more	+69
Single	+64
Black	+31
Spanish speaking	+71

NOTE: All figures represent percent difference (plus or minus) from total U.S.

Despite a comparative shortfall of toddlers to fuel baby department sales, some items—notably disposable diapers—do well. (Households with a child under two show a 96.6% purchase rate, compared to only 85.5% nationally.) Demand for most breakfast items is slack, although English muffins and breakfast/snack bars deserve in-depth stocking.

Inspired perhaps by their proximity to the nation's major vineyards, San Franciscans consume grape-derived products at twice the national rate. Beer and soft drinks (not shown) do well with the exception of non-diet colas. Both coffee and tea elicit tepid interest, although decaffinated instant sells well to older homemakers.

Snack sections, often located near wine in supermarkets here, have corn and tortilla chips and snacks as their high-interest product. Cookies, crackers, and most candies have below-average appeal. Dessert eaters apparently prefer to buy them already made at supers or bake shops rather than to buy the ingredients.

San Francisco's preference for wine is complemented by its craving for cheese, especially the natural or imported variety. Consumption is highest among those whose annual household incomes exceed $50,000. The high popularity of frozen main courses is explained mostly by its appeal to one-person and lower-income households.

BABY PRODUCTS

Disposable diapers	+16
Baby ointment	+14
Pre-moist. cleansing wipes	+9
Bar soap for baby	+6
Vitamins for children	+3
Baby foods	-12
Baby shampoo	-14
Baby lotion	-15
Baby powder	-28
Teething remedies	-71

BREAKFAST FOODS/BAKED GOODS

English muffins	+27
Breakfast/snack bars	+15
Honey	+12
Stuffing mixes/products	-4
Breakfast cereals (hot)	-4
Bread	-16
Peanut butter	-21
Jams/jellies	-22
Table syrup/molasses	-22
Toaster products	-28

ENTERTAINMENT BEVERAGES

Brandy & cognac	+202
Bottled water	+158
Domestic dinner table wine	+99
Port/sherry/dessert wine	+98
Champagne/sparkling wine	+95
Ale	+3
Canadian whisky	-10
Rye or blended whisky	-10
Sangria/pop/party wine	-16
Reg. colas (not diet)	-33

OTHER BEVERAGES

Non-dairy cream subs.	+14
Instant coffee (decaf)	+5
Grapefruit juice	0
Misc. fruit juices/drinks	0
Tomato/vegetable juices	-1
Ground coffee	-12
Regular tea	-19
Instant tea	-28
Instant iced tea mix	-29
Powdered soft drinks	-42

CANDY & SNACKS

Corn/tortilla chips/snacks	+8
Mints	+2
Nuts	+2
Hard roll candy	-5
Cough drops	-7
Popcorn	-17
Cookies	-21
Pretzels	-32
Snack cakes	-40
Meat sticks	-40

DESSERTS

Baking mixes	+5
Brownie/cookie mixes	-8
Canned puddings/fillings	-13
Whipped topping	-13
Frosting/frosting mixes	-18
Instant powdered pudding	-18
Flour	-21
Granulated sugar	-22
Flavored gelatin desserts	-27
Dry cake mixes	-28

DAIRY

Yogurt	+69
Natural or imported cheese	+27
Spread cheese	+18
Butter	+15
Cottage cheese	0
Refrig. dough products	-19
Orange juice (not frozen)	-32
Margarine	-32
American cheese	-44
Shortening	-48

FROZEN FOODS

Corn on the cob	+24
Main courses	+11
Complete dinners	+9
Orange juice	0
Vegetables	-6
Ice cream/ice milk/sherb.	-9
Waffles/pancakes/Fr. toast	-12
Potato products	-22
Pizza	-39
Poultry	-43

Source: Mediamark Research Inc.

SAN FRANCISCO

Both Mexican foods and rice mixes appeal to San Franciscans and are excellent promotional candidates. The only demographic weak spot for Mexican foods is older households. The many Oriental households and a general culinary venturesomeness contribute to the fine showing of soy sauce and seasonings/spices.

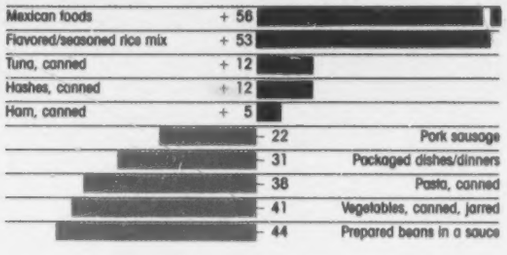
Kitchen-use paper and plastic products on the whole have a muted appeal here, perhaps colored by the above average proportion of one-person households. Household and cleaning products show wide swings above and below the national norms, underlining the need for judicious space allocation.

Pet sections here must accommodate a wide variety of products for the area's fussy felines. These lucky cats live for the most part with upper income college graduates. Cameras, cassette players and calculators are all popular and suggest merchandising possibilities for general merchandise departments.

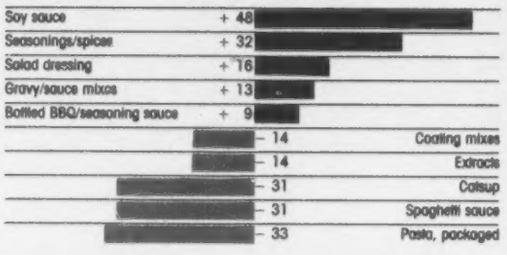
The consumption rate for adult HBA products rarely exceeds the national averages, although some specialized categories such as eye wash/drops and athlete's foot remedies stand out. On the women's side, face and skin care products are favored over hair care products.

Hair care products are popular here, with hair conditioning treatment leading the list thanks to its strong appeal to blacks and 18-to-24's. Smoking of any kind is significantly below national patterns.

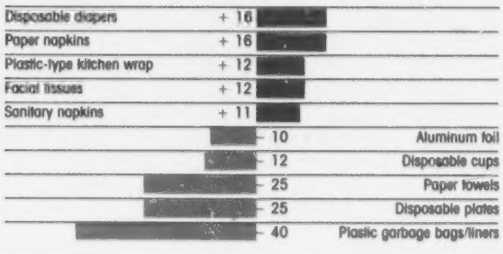
PACKAGED VEGETABLES/FRUITS/MEATS/PREPARED MEALS


Mexican foods + 56
Flavored/seasoned rice mix + 53
Tuna, canned + 12
Hashes, canned + 12
Ham, canned + 5
Pork sausage - 22
Packaged dishes/dinners - 31
Pasta, canned - 38
Vegetables, canned, jarred - 41
Prepared beans in a sauce - 44

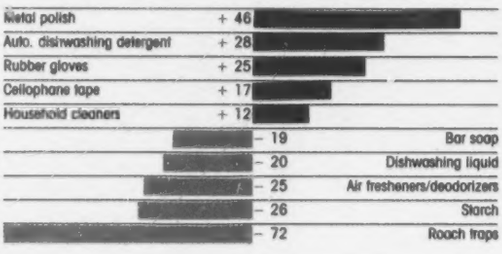
SEASONINGS, CONDIMENTS & SAUCES



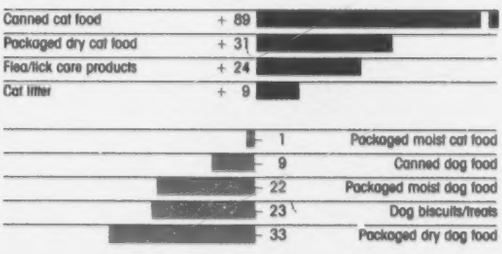
PAPER & PLASTIC PRODUCTS


Disposable diapers + 16
Paper napkins + 16
Plastic-type kitchen wrap + 12
Facial tissues + 12
Sanitary napkins + 11
Aluminum foil - 10
Disposable cups - 12
Paper towels - 25
Disposable plates - 25
Plastic garbage bags/liners - 40

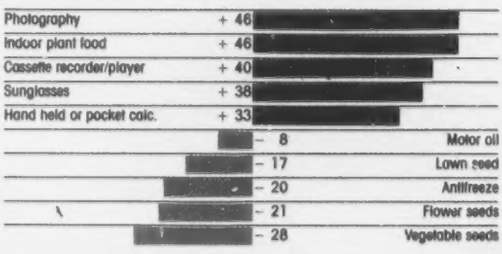
HOUSEHOLD & CLEANING PRODUCTS


Metal polish + 46
Auto. dishwashing detergent + 28
Rubber gloves + 25
Cellophane tape + 17
Household cleaners + 12
Bar soap - 19
Dishwashing liquid - 20
Air fresheners/deodorizers - 25
Starch - 26
Roach traps - 72

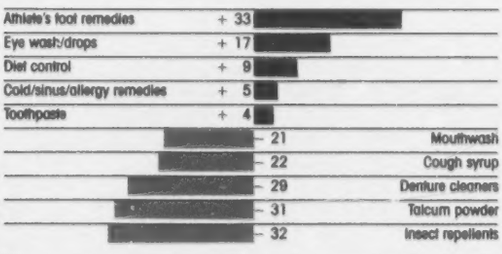
PET PRODUCTS


Canned cat food + 89
Packaged dry cat food + 31
Flea/tick care products + 24
Cat litter + 9
Packaged moist cat food - 1
Canned dog food - 9
Packaged moist dog food - 22
Dog biscuits/treats - 23
Packaged dry dog food - 33

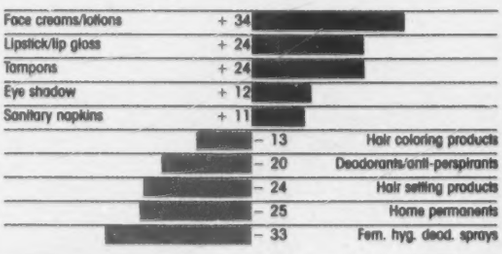
GENERAL MERCHANDISE


Photography + 46
Indoor plant food + 46
Cassette recorder/player + 40
Sunglasses + 38
Hand held or pocket calc. + 33
Motor oil - 8
Lawn seed - 17
Antifreeze - 20
Flower seeds - 21
Vegetable seeds - 28

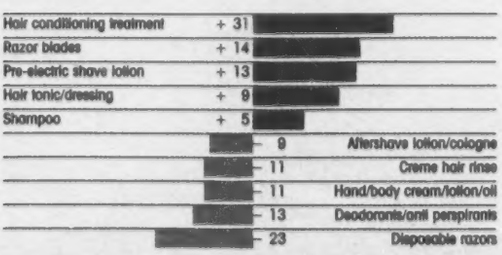
HBA—ADULTS



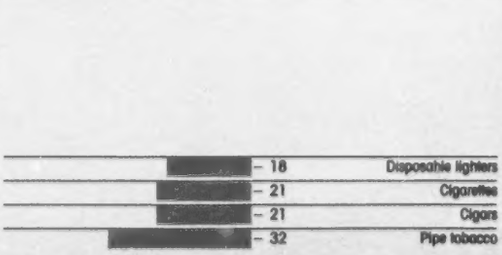
HBA—WOMEN


Face creams/lotions + 34
Lipstick/lip gloss + 24
Tampons + 24
Eye shadow + 12
Sanitary napkins + 11
Hair coloring products - 13
Deodorants/anti-perspirants - 20
Hair setting products - 24
Home permanents - 25
Fem. hyg. deod. sprays - 33

HBA—MEN


Hair conditioning treatment + 31
Razor blades + 14
Pre-electric shave lotion + 13
Hair tonic/dressing + 9
Shampoo + 5
Aftershave lotion/cologne - 9
Creme hair rinse - 11
Hand/body cream/lotion/oil - 11
Deodorants/anti perspirants - 13
Disposable razors - 23

TOBACCO PRODUCTS



Source: Mediamark Research Inc.

ST. LOUIS

St. Louis Women Opt for Convenience in Frozens & Dry Grocery

Despite its lack of deviation from the demographic norm of the total country, St. Louis evidences a mind of its own in its consumption habits. Nowhere (among our 10 markets at least) does frozen pizza bring more acclaim. Two sections of the supermarket with appeal for St. Louis shoppers are desserts (including several kinds of ingredients for home baking) and packaged and prepared foods (including instant potatoes, packaged dinners and canned or glassed vegetables). Pet food figures indicate a scarcity of cats on the prowl.

OUTSTANDING DEMOGRAPHICS*
(Female Homemakers)

18-24	+12
1 person household	+17
5+ persons household	+34

*Percent difference from total U.S.

NOTE: All figures represent percent difference (plus or minus) from total U.S.

With its above average incidence of children under six, St. Louis offers fertile opportunity for baby products departments, especially remedies and HBA. While consumption of most breakfast and baked products approximates national norms, both English muffins and honey have failed to gain much of a following.

When they meet in St. Louis, it's more likely to be for a beer than in any of the nine other markets in this study. The beer most likely will be domestic, and its drinkers to have attended college and to live in upper income households. On the non-alcoholic side both instant tea and powdered soft drinks are standouts with special promotional potential.

Compared to other markets, St. Louis is much more accommodating to popcorn and snack cakes, so snack departments should take this deviation into account in allocating space. St. Louis also stands alone in its need for an extensive dessert department to provide ingredients for home bakers.

The already-noted propensity of St. Louis homemakers to turn on their ovens to prepare desserts is reflected in the performance of refrigerated dough products and shortening in the dairy section. One treat they like to buy in the most convenient form, however, is frozen pizza—which they consume at twice the rate of most other markets.

BABY PRODUCTS

Baby shampoo	+ 26
Pain relievers/fever reduc.	+ 14
Pre-moistened cleansing wipes	+ 14
Children's cough syrup	+ 13
Baby powder	+ 11
Prepared infant formula	– 14
Infant cereal	– 16
Baby foods	– 20
Bar soap for baby	– 23
Teething remedies	– 33

BREAKFAST FOODS/BAKED GOODS

Stuffing mixes/products	+ 11
Breakfast/snack bars	+ 10
Bread	+ 8
Toaster products	+ 5
Waffle/pancake mix	+ 3
Breakfast cereals/cold	– 3
Jams/jellies	– 4
Peanut butter	– 9
Honey	– 23
English muffins	– 28

ENTERTAINMENT BEVERAGES

Scotch whisky	+ 38
Domestic reg. beer	+ 19
Sangria/pop/party wine	+ 16
Mixed drinks	+ 12
Diet cola drinks	+ 10
Rye or blended whisky	– 22
Imported beer	– 29
Brandy & cognac	– 31
Ale	– 59
Bottled water	– 61

OTHER BEVERAGES

Instant tea	+ 44
Powdered soft drinks	+ 42
Non-dairy cream subs.	+ 13
Grapefruit juice	+ 10
Ground coffee	+ 2
Misc. fruit juices/drinks	– 9
Drink additives	– 9
Instant iced tea mix	– 12
Dry milk	– 20
Instant coffee (reg)	– 23

CANDY & SNACKS

Popcorn	+ 36
Pretzels	+ 31
Snack cakes	+ 23
Corn/tortilla chips/snacks	+ 16
Crackers	+ 10
Nuts	– 3
Potato chips	– 3
Regular size candy bars	– 5
Chewing gum	– 9
Hard roll candy	– 12

DESSERTS

Canned puddings/fillings	+ 30
Baking mixes	+ 23
Brownie/cookie mixes	+ 20
Dry cake mixes	+ 20
Flour	+ 13
Flavored gelatin desserts	+ 12
Whipped topping	+ 11
Granulated sugar	+ 10
Instant powdered pudding	+ 6
Frosting/frosting mixes	+ 4

DAIRY

Refrig. dough products	+ 29
American cheese	+ 25
Shortening	+ 21
Ready-to-serve dips	+ 19
Eggs	+ 7
Cottage cheese	– 4
Natural or imported cheese	– 5
Fresh milk	– 8
Butter	– 19
Yogurt	– 40

FROZEN FOODS

Pizza	+ 58
Potato products	+ 31
Fish/seafood	+ 24
Main courses	+ 16
Complete dinners	+ 15
Waffles/pancakes/Fr. toast	+ 8
Poultry	+ 8
Ice cream/ice milk/sherb.	– 6
Vegetables	– 23
Corn on the cob	– 46

Source: Mediamark Research Inc.

ST. LOUIS

Main-course convenience is important here, so both packaged instant potatoes and packaged dishes and dinners excel in the dry grocery department, the former selling best in stores with higher income customers and the latter in stores with lower income customers.

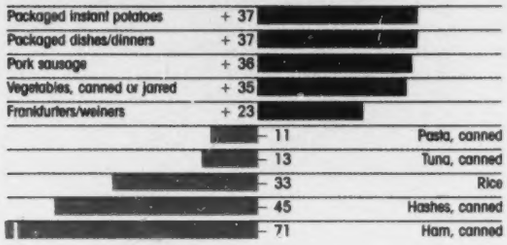
With judicious selection, both the paper and household departments offer strong candidates for weekly promotions. Demand for aluminum foil, for example, is matched in none of our other markets. And products for dishwashers or laundries also provide a draw.

It's a dog's life in St. Louis apparently, as all three varieties of cat food lag far below national consumption patterns. Almost all kinds of products found in general merchandise departments show a good potential, especially those that can improve the performance of an automobile or a lawn.

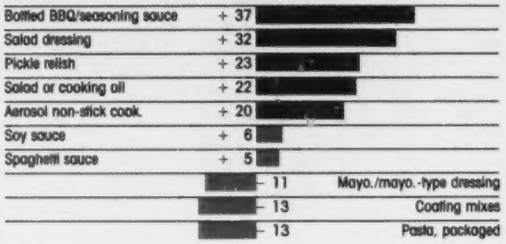
Two hard-to-departmentalize categories are especially popular here: insect repellents and artificial sweeteners. Both should be provided with maximum visibility, including dual locations and special displays where possible. Despite a generally spotty picture for women's HBA, a few specialties, including both pressed and loose powder, do well.

The incidence of usage of various men's HBA products by St. Louis men follows the national prototype very faithfully, with mostly single-digit deviations. Over in the smokes section, cigars are more likely to be called for than pipe tobacco.

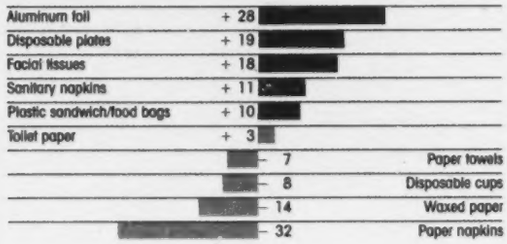
PACKAGED VEGETABLES/FRUITS/MEATS/PREPARED MEALS


Packaged instant potatoes + 37
Packaged dishes/dinners + 37
Pork sausage + 36
Vegetables, canned or jarred + 35
Frankfurters/weiners + 23
Pasta, canned − 11
Tuna, canned − 13
Rice − 33
Hashes, canned − 45
Ham, canned − 71

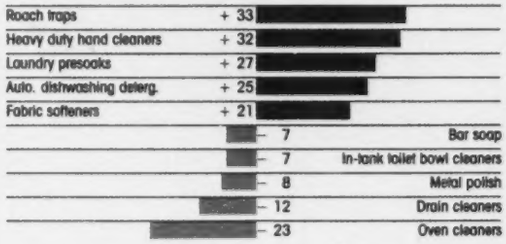
SEASONINGS, CONDIMENTS & SAUCES


Bottled BBQ/seasoning sauce + 37
Salad dressing + 32
Pickle relish + 23
Salad or cooking oil + 22
Aerosol non-stick cook. + 20
Soy sauce + 6
Spaghetti sauce + 5
Mayo./mayo.-type dressing − 11
Coating mixes − 13
Pasta, packaged − 13

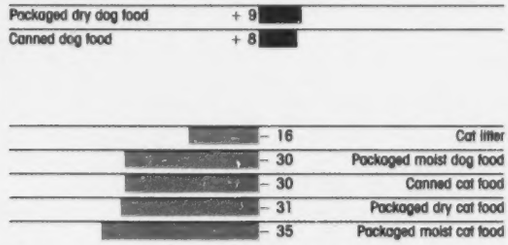
PAPER & PLASTIC PRODUCTS


Aluminum foil + 28
Disposable plates + 19
Facial tissues + 18
Sanitary napkins + 11
Plastic sandwich/food bags + 10
Toilet paper + 3
Paper towels − 7
Disposable cups − 8
Waxed paper − 14
Paper napkins − 32

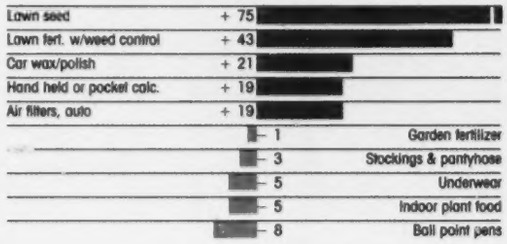
HOUSEHOLD & CLEANING PRODUCTS


Roach traps + 33
Heavy duty hand cleaners + 32
Laundry presoaks + 27
Auto. dishwashing deterg. + 25
Fabric softeners + 21
Bar soap − 7
In-tank toilet bowl cleaners − 7
Metal polish − 8
Drain cleaners − 12
Oven cleaners − 23

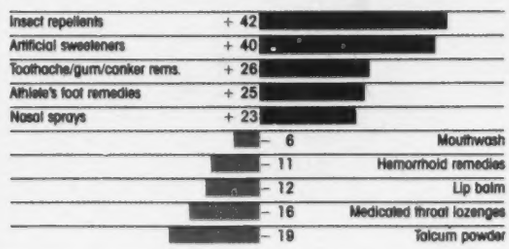
PET PRODUCTS


Packaged dry dog food + 9
Canned dog food + 8
Cat litter − 16
Packaged moist dog food − 30
Canned cat food − 30
Packaged dry cat food − 31
Packaged moist cat food − 35

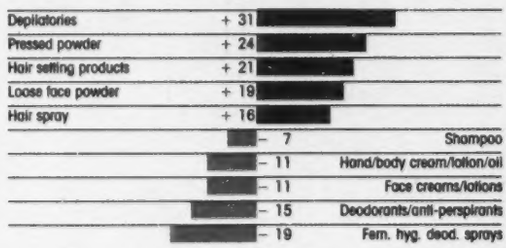
GENERAL MERCHANDISE


Lawn seed + 75
Lawn fert. w/weed control + 43
Car wax/polish + 21
Hand held or pocket calc. + 19
Air filters, auto + 19
Garden fertilizer − 1
Stockings & pantyhose − 3
Underwear − 5
Indoor plant food − 5
Ball point pens − 8

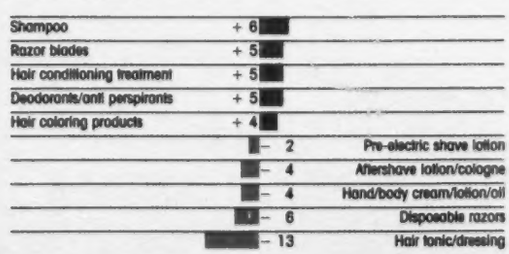
HBA—ADULTS


Insect repellents + 42
Artificial sweeteners + 40
Toothache/gum/canker rems. + 26
Athlete's foot remedies + 25
Nasal sprays + 23
Mouthwash − 6
Hemorrhoid remedies − 11
Lip balm − 12
Medicated throat lozenges − 16
Talcum powder − 19

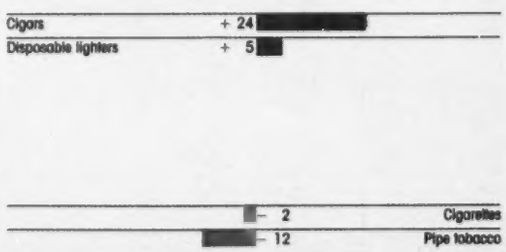
HBA—WOMEN


Depilatories + 31
Pressed powder + 24
Hair setting products + 21
Loose face powder + 19
Hair spray + 16
Shampoo − 7
Hand/body cream/lotion/oil − 11
Face creams/lotions − 11
Deodorants/anti-perspirants − 15
Fem. hyg. deod. sprays − 19

HBA—MEN


Shampoo + 6
Razor blades + 5
Hair conditioning treatment + 5
Deodorants/anti perspirants + 5
Hair coloring products + 4
Pre-electric shave lotion − 2
Aftershave lotion/cologne − 4
Hand/body cream/lotion/oil − 4
Disposable razors − 6
Hair tonic/dressing − 13

TOBACCO PRODUCTS



Source: Mediamark Research Inc.

WASHINGTON, D.C.

Capital Spending Is Meager In Many Supermarket Categories

Demographically, the nation's capital is a surprising potpourri: a greater incidence of blacks than the nine other markets together, with the greatest incidence of upper income households and college graduates. The picture of product usage here is the bleakest of the 10 markets, with relatively few products exceeding the national average in usage and many showing substantially below average usage. One exception is baby products, particularly foods and formulas. Another is entertainment beverages, along with several HBA products.

OUTSTANDING DEMOGRAPHICS
(Female Homemakers)

25-34	+18
35-44	+14
45-54	+15
55-64	+13
Graduated college	+105
Working full time	+43
3 or 4 person household	+26
HH income $35,000 or more	+81
Single	+22
Black	+141

NOTE: All figures represent percent difference (plus or minus) from total U.S.

A higher percentage of Washington households have children living there than does any other of the 10 markets. Both prepared infant formula and baby foods sell best to blacks, while whites are better patrons for disposable diapers. Perhaps Washingtonians wait to have breakfast until they get to work, as products in this category perform poorly.

While most wines (except dessert and pop wines) sell better to whites, blacks show a stronger preference for brandy/cognac and for Scotch. Brews are comparatively weak here except for ale; and soft drink sales are precisely that. No standouts are apparent among the varieties of coffee and tea sold.

The Washingtonian sweet tooth is frequently sated by candy (sorry, no crosstabs on jelly beans are available.) No variety of snack (except nuts) wins much notice from shoppers. Even less of a magnet is the dessert department, as the whole idea of preparing desserts from scratch appears to have been vetoed.

The frozens department holds much greater interest for shoppers here than does dairy. Highest use of frozens is apparently in planning the main meal of the day, as both vegetables and complete dinners score high, the former in households with high income and a homemaker who works part time, and the latter in lower income and black households.

BABY PRODUCTS

Baby foods	+37
Infant cereal	+35
Bar soap for babies	+26
Prepared infant formula	+10
Vitamins for children	+7
Baby shampoo	-27
Baby powder	-31
Cotton swabs	-41
Baby oil	-43
Children's cough syrup	-44

BREAKFAST FOODS/BAKED GOODS

Breakfast/snack bars	+4
Toaster products	-1
English muffins	-1
Stuffing mixes/products	-20
Breakfast cereals (cold)	-22
Breakfast cereals (hot)	-28
Peanut butter	-28
Table syrup/molasses	-43

ENTERTAINMENT BEVERAGES

Port/sherry/dessert wines	+98
Sangria/pop/party wine	+41
Scotch whisky	+37
Gin	+26
Brandy & cognac	+19
Vodka	-15
Diet soft drinks (not cola)	-18
Domestic reg. beer	-19
Canadian whisky	-26
Rye or blended whisky	-51

OTHER BEVERAGES

Grapefruit juice	+5
Misc. fruit juices/drinks	0
Dry milk	-21
Non-dairy cream subs.	-23
Instant coffee (reg)	-23
Instant iced tea mix	-26
Drink additives	-38

CANDY & SNACKS

Mints	+15
Hard roll candy	+12
Nuts	+4
Packages mini. candy bars	+1
Corn/tortilla chips/snacks	-28
Popcorn	-28
Cough drops	-35
Cookies	-35
Crackers	-37

DESSERTS

Frosting/frosting mixes	-10
Brownie/cookie mixes	-13
Dry cake mixes	-14
Canned puddings/fillings	-18
Baking mixes	-19
Instant powdered pudding	-20
Granulated sugar	-23
Whipped topping	-25
Flour	-33
Flavored gelatin desserts	-46

DAIRY

Butter	+3
Yogurt	-3
Refrig. dough products	-15
Ready-to-serve dips	-19
Shortening	-23
Spread cheese	-32
American cheese	-35
Fresh milk	-41
Orange juice (not frozen)	-41
Eggs	-49

FROZEN FOODS

Vegetables	+43
Complete dinners	+18
Orange juice	+9
Poultry	+8
Fish/seafood	+7
Waffles/pancakes/Fr. toast	-4
Potato products	-7
Corn on the cob	-30
Ice cream/ice milk/sherb.	-31
Pizza	-47

Source: Mediamark Research Inc.

WASHINGTON, D.C.

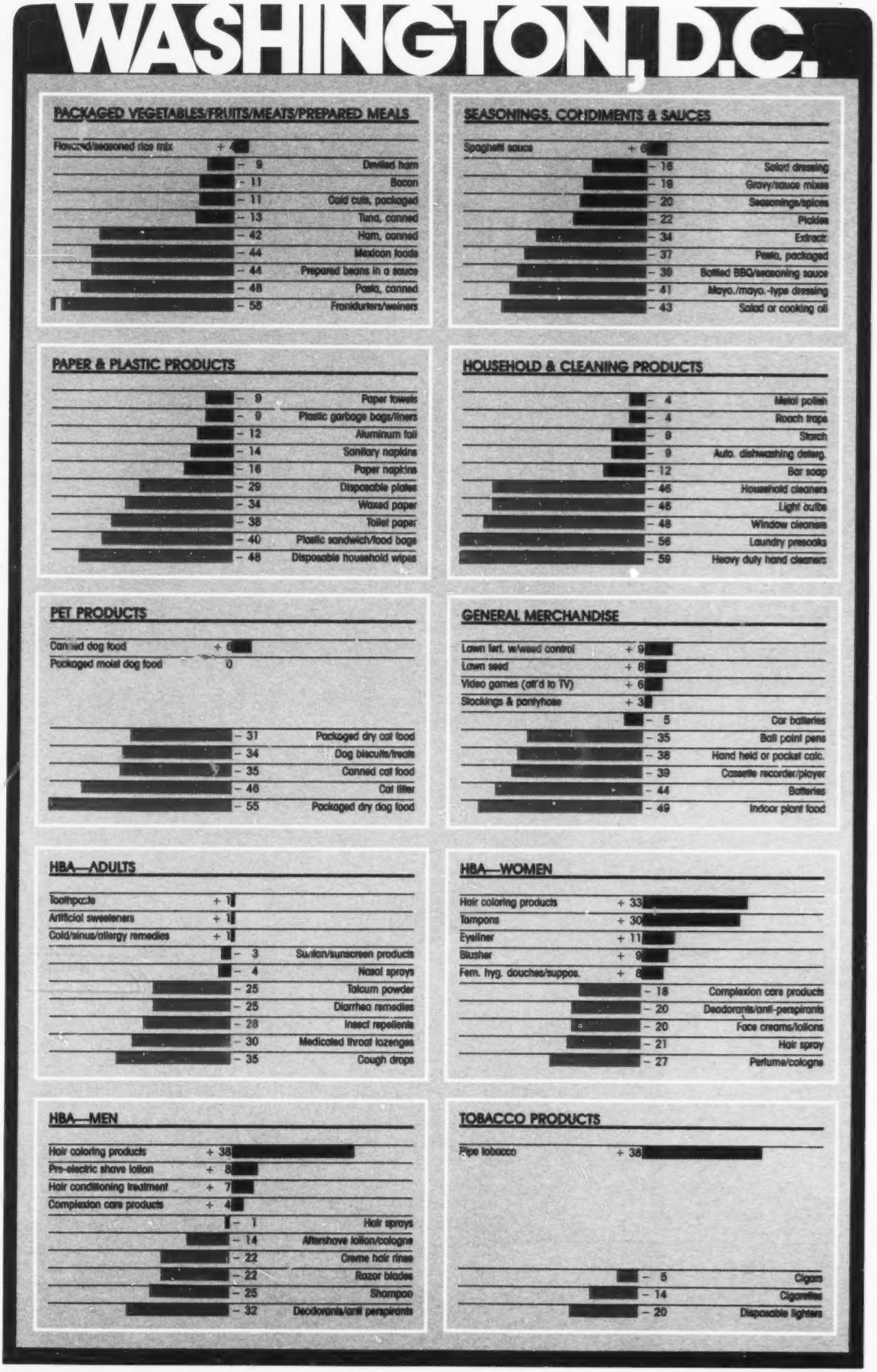
Given the poor showing of a wide variety of dry grocery food products, it seems safe to assert that item selection should be both short and tailored. Once again neighborhood demographics are paramount, with salad dressing, for example, selling at three times the rate among whites as among blacks.

While Washington may be celebrated as the country's principal fountain of paperwork, this doesn't carry over to supermarket paper departments. Only paper towels and plastic bags/liners even approach national rate of consumption. Household cleaners and supplies also show pronounced slackness.

While popularity of pet products in white households approximates the national incidence, usage in black households is low, bringing down the market's averages. Space given to pet departments here should obviously be in accordance with its demographic draw. Lawn supplies sell better where the grass is greener—near top-valued homes.

Whatever ails Washington these days, over the counter remedies are apparently not being tried as a cure. Few sell well here. But the HBA department is given a tonic with some fast-moving women's items, notably hair-coloring products, with their strong appeal to women who work full time and to black women.

Does he or doesn't he? Despite denials that hair coloring is used at the top of the D.C. power pyramid, this product is the only one in this group that wins a higher incidence of usage in Washington than in the other nine markets. White and middle income males often opt for a pipe.


PACKAGED VEGETABLES/FRUITS/MEATS/PREPARED MEALS
Flavored/seasoned rice mix + 4
Deviled ham – 9
Bacon – 11
Cold cuts, packaged – 11
Tuna, canned – 13
Ham, canned – 42
Mexican foods – 44
Prepared beans in a sauce – 44
Pasta, canned – 48
Frankfurters/weiners – 58
SEASONINGS, CONDIMENTS & SAUCES
Spaghetti sauce + 6
Salad dressing – 16
Gravy/sauce mixes – 19
Seasonings/spices – 20
Pickles – 22
Extract – 34
Pasta, packaged – 37
Bottled BBQ/seasoning sauce – 30
Mayo./mayo.-type dressing – 41
Salad or cooking oil – 43
PAPER & PLASTIC PRODUCTS
Paper towels – 9
Plastic garbage bags/liners – 9
Aluminum foil – 12
Sanitary napkins – 14
Paper napkins – 16
Disposable plates – 29
Waxed paper – 34
Toilet paper – 38
Plastic sandwich/food bags – 40
Disposable household wipes – 48
HOUSEHOLD & CLEANING PRODUCTS
Metal polish – 4
Roach traps – 4
Starch – 9
Auto. dishwashing deterg. – 9
Bar soap – 12
Household cleaners – 46
Light duties – 46
Window cleaners – 48
Laundry presoaks – 56
Heavy duty hand cleaners – 59
PET PRODUCTS
Canned dog food + 6
Packaged moist dog food 0
Packaged dry cat food – 31
Dog biscuits/treats – 34
Canned cat food – 35
Cat litter – 46
Packaged dry dog food – 55
GENERAL MERCHANDISE
Lawn fert. w/weed control + 9
Lawn seed + 6
Video games (att'd to TV) + 6
Stockings & pantyhose + 3
Car batteries – 5
Ball point pens – 35
Hand held or pocket calc. – 38
Cassette recorder/player – 39
Batteries – 44
Indoor plant food – 49
HBA—ADULTS
Toothpaste + 1
Artificial sweeteners + 1
Cold/sinus/allergy remedies + 1
Suntan/sunscreen products – 3
Nasal sprays – 4
Talcum powder – 25
Diarrhea remedies – 25
Insect repellents – 28
Medicated throat lozenges – 30
Cough drops – 35
HBA—WOMEN
Hair coloring products + 33
Tampons + 30
Eyeliner + 11
Blusher + 9
Fem. hyg. douches/suppos. + 8
Complexion care products – 18
Deodorants/anti-perspirants – 20
Face creams/lotions – 20
Hair spray – 21
Perfume/cologne – 27
HBA—MEN
Hair coloring products + 38
Pre-electric shave lotion + 8
Hair conditioning treatment + 7
Complexion care products + 4
Hair sprays – 1
Aftershave lotion/cologne – 14
Creme hair rinse – 22
Razor blades – 22
Shampoo – 25
Deodorants/anti perspirants – 32
TOBACCO PRODUCTS
Pipe tobacco + 38
Cigars – 5
Cigarettes – 14
Disposable lighters – 20

Source: Mediamark Research Inc.

Continued from page 25

PRODUCT INDEX

Product	Percent Using Total U.S.	(Base)	Classification
Pain relieving rubs/ liquids	31.4	(AU)*	HBA-A
Pancake/waffle mix	38.9	(1+ carton L30D)	BF/BG
Pantyhose/stockings	41.3	(3+ bought L30D)***	GM
Pasta, canned	15.5	(2+ cans L30D)	Pk/Pr
Pasta, packaged	18.0	(4+ lbs L30D)	C/S/S
Peanut butter	28.6	(2+ jars L30D)	BF/BG
Pens, ballpoint	36.2	(purchased L12M)*	GM
Perfume/cologne	49.8	(7+ times L7D)***	HBA-W
Photography	18.4	(participated L12M)*	GM
Pickles	32.0	(2+ jars L30D)	C/S/S
Pipe tobacco	3.4	(AU)*	Tob
Pizza, frozen	24.6	(2+ pkg L30D)	FF
Plant food, indoor	31.4	(AB)	GM
Plastic-type kitchen wrap	44.7	(2+ rolls L6M)	Paper
Plates, disposable	37.5	(1+ pkg L30D)	Paper
Pork sausage	33.2	(2+ lbs L30D)	Pk/Pr
Popcorn	35.9	(2+ bowls L30D)	C/S
Potato chips	47.6	(2+ pkg L30D)	C/S
Potatoes, packaged instant	26.5	(1+ pkg L30D)	Pk/Pr
Potato products, frozen	23.3	(2+ pkg L30D)	FF
Poultry, frozen	26.0	(1+ pkg L30D)	FF
Powder, pressed	24.4	(3+ times L7D)	HBA-W
Prepared dishes/ dinners, complete packaged	22.8	(2+ pkg L30D)	Pk/Pr
Presoaks, laundry	16.1	(3+ loads L7D)	H/C
Pretzels	24.2	(1+ boxes L30D)	C/S
Pudding, instant powdered	27.7	(2+ boxes L30D)	Des
Puddings/pie fillings, precooked/canned	22.7	(AB)	Des
R			
Razor blades, men	46.5	(3+ blades L7D)**	HBA-M
Razor blades, women	43.3	(AU)***	HBA-W
Razors, disposable, men	33.7	(AU)**	HBA-M
Razors, disposable, women	44.7	(AU)***	HBA-W
Relish, pickle	33.6	(1+ jars L3M)	C/S/S
Rice	25.8	(2+ pkg L30D)	Pk/Pr
Rice mixes, flavored/ seasoned	18.1	(1+ pkg L30D)	Pk/Pr
Roach traps	9.4	(AB)	H/C
Room deodorizers	35.6	(2+ cont. L3M)	H/C
Rubber gloves	29.4	(AB)	H/C
Rug/carpet cleaners	40.8	(AB)	H/C
Rum	15.1	(AU)*	Bev-E
Rye or blended whisky	5.9	(AU)*	Bev-E
S			
Salad dressing	28.3	(3+ bottles L30D)	C/S/S
Sandwich or food bags, plastic	24.7	(2+ boxes L30D)	Paper
Sanitary napkins	32.8	(5+ times L30D)***	Paper, HBA-W
Sauce/gravy mixes	18.7	(2+ pkg L30D)	C/S/S
Sausage, pork	33.2	(2+ lbs L30D)	Pk/Pr
Scouring pads	42.0	(3+ pads L30D)	H/C
Scouring powder	32.7	(2+ cans L30D)	H/C
Scotch whisky	10.3	(AU)*	Bev-E
Seasonings/spices	40.1	(3+ pkg L6M)	C/S/S
Seeds, flower	25.0	(Used L12M)*	GM
Seed, lawn	15.7	(Used L12M)*	GM
Seeds, vegetable	27.3	(Used L12M)*	GM
Shampoo, men	66.2	(3+ times L7D)**	HBA-M
Shampoo, women	59.2	(3+ times L7D)***	HBA-W
Shave lotion, pre-electric	13.5	(AU)**	HBA-M
Shaving creams, gels	53.0	(3+ times L7D)**	HBA-M
Shortening	37.3	(2+ lbs L30D)	Dairy
Snack cakes	34.1	(AB)	C/S
Snack bars, breakfast	13.7	(AU)	BF/BG
Soap, bar	15.2	(7+ bars L30D)	H/C
Soaps/detergents, fine fabrics	20.6	(3+ loads L7D)	H/C
Soaps/detergents, reg. laundry	63.0	(4+ loads L7D)	H/C
Soft drinks, diet (not cola)	24.4	(AU)*	Bev-E
Soft drinks, powdered	33.2	(AU)	Bev-O
Soft drinks, regular	44.2	(AU)*	Bev-E
Soy sauce	41.4	(1+ bottles L6M)	C/S/S
Spaghetti sauce	29.3	(2+ cans L30D)	C/S/S
Starch	16.4	(1+ cont. L30D)	H/C
Stockings/pantyhose	41.3	(3+ bought L30D)***	GM
Stuffing mixes/ products	31.8	(AB)	BF/BG
Sunburn remedies	17.4	(AU)*	HBA-A
Sunglasses	16.0	(Bought L6M)***	GM
Suntan/sunscreen products	33.4	(AU)*	HBA-A
Sugar, granulated	64.9	(4+ lbs L30D)	Des
Sweeteners, artificial	24.5	(AU)*	HBA-A
Syrup/molasses	17.5	(2+ cont L30D)	BF/BG
T			
Talcum powder	30.7	(5+ times L7D)*	HBA-A
Tampons	23.7	(7+ times L30D)***	HBA-W
Tape, cellophane	7.0	(3+ rolls L6M)	H/C
Tea, instant	24.9	(AB)	Bev-O
Tea, instant, iced mix	22.4	(1+ glass avg day)	Bev-O
Tea, regular	39.5	(2+ glass avg day)	Bev-O
Teething remedies	5.5	(AU)	Baby
Throat lozenges, medicated	13.4	(2+ times L7D)*	HBA-A
Tissue, facial	24.6	(3+ boxes L30D)	Paper
Tobacco, pipe	3.4	(AU)	Tob
Toilet bowl cleaners, in-bowl	56.8	(AB)	H/C
Toilet bowl cleaners, in-tank	33.4	(AB)	H/C
Toilet paper	60.9	(5+ rolls L30D)	Paper
Toaster products	19.5	(AB)	BF/BG
Toothache/gum/ canker sore remedies	9.4	(1+ times L30D)*	HBA-A
Toothpaste	57.7	(11+ times L7D)*	HBA-A
Topping, whipped	47.9	(1+ cont. L30D)	Des
Towels, paper	35.3	(4+ rolls L30D)	Paper
Tuna, canned	36.0	(3+ cans L30D)	Pk/Pr
U			
Underwear, men's	44.0	(Bought L12M)**	GM
V			
Vegetables, canned or jarred	43.6	(5+ cans L30D)	Pk/Pr
Vegetables, frozen	18.4	(7+ pkg L30D)	FF
Video games (att'd to TV)	12.7	(Own)*	GM
Vitamins, children's	17.5	(AU)	Baby
Vodka	17.8	(AU)*	Bev-E

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PRODUCT INDEX

Product	Percent Using Total U.S.	(Base)	Classification
W			
Waffles/pancakes/ French toast, frozen	23.8	(AB)	FF
Waffle/pancake mix	38.9	(1+ carton L30D)	BF/BG
Water, bottled	9.3	(AU)	Bev-E
Waxed paper	19.5	(2+ rolls L6M)	Paper
Wieners/frankfurters	25.4	(3+ lbs L30D)	Pk/Pr
Whisky, Canadian	11.7	(AU)*	Bev-E
Window cleaners	41.5	(2+ cont L6M)	H/C
Wine, dessert/port/ sherry	6.0	(AU)*	Bev-E
Wine, domestic dinner table	29.0	(AU)*	Bev-E
Wine, imported dinner table	16.5	(AU)*	Bev-E
Wine, party/sangria/ pop	6.9	(AU)*	Bev-E
Wine, sparkling/ champagne/cold duck	14.8	(AU)*	Bev-E
Wipes, disposable household	18.9	(AB)	Paper
Wrap, plastic-type kitchen	44.7	(2+ rolls L6M)	Paper
Wax, polish, auto	33.5	(AB)	GM
Wipes, pre-moistened cleaning	12.3	(AU)	Baby
Y			
Yogurt	22.2	(1+ cups L7D)	Dairy

PROCTER & GAMBLE

NOTICE TO THE TRADE

ATTENTION STORE MANAGER:

We offer Cooperative Merchandising Agreements, promotion allowances and merchandising materials which are practical and usable by all retailers regardless of size.

Payments are made for newspaper or handbill featuring, display, and consumer directed promotion. Details are set forth in specific agreements. Proof of performance (e.g. tear sheets) and proof of delivery (jobber's invoice) are required for payment of allowance. Our merchandising materials consist of display material, newspaper mats and proofs etc.

If you would like to receive specific information on offers available to you, send your name, address and telephone number to Procter & Gamble, Box 162, Cincinnati, Ohio 45201. Please specify, if possible, the Division in whose brands you are interested.

Packaged Soap & Detergent Division
Beauty Care Division
Health & Personal Care Division
Paper Products Division
Food Products Division
Bar Soap & Household Cleaning Products Division
Coffee Division

BOYLE-MIDWAY

NOTICE TO THE TRADE

ATTENTION STORE MANAGER: We offer Cooperative Merchandising Agreements, promotion allowances and merchandising materials which are practical and usable by all retailers regardless of size.

Payments are made for newspaper or handbill featuring, display, and consumer-directed promotion. Details are set forth in specific agreements. Proof of performance (e.g., tear sheets) and proof of delivery (jobber's invoice) are required for payment of allowance. Our merchandising materials consist of display material, newspaper mats and proofs etc.

If you would like to receive specific information on offers available to you, send your name, address and telephone number to:

Boyle-Midway
Sales Department
685 Third Avenue
New York, New York 10017

Notice to all retailers

Periodically, Mobil Chemical Company's Consumer Products Division offers promotional discounts and/or special allowances for displaying, advertising and promoting its Hefty® line of products.

For details send your Name, Address and Telephone Number to your local Mobil Chemical sales representative or write to: Mobil Chemical Company, Consumer Products Division, Sales Promotion Department, Pittsford, N.Y. 14534.

Mobil Chemical Company
Division of Mobil Oil Corporation
Consumer Products Division
Pittsford, N.Y. 14534

four-week period were cream deodorants dipping 11.6 percent and feminine hygiene deodorants with a decline of 6.1 percent.

In the first aid product product group, the first aid products category climbed back into the plus column, on the basis of a small 1.2 percent increase. First aid antiseptic movement continued strong, and the most recent four-week gain amounted to 8.8 percent, slightly less than the 12.2 percent increase during the preceding period.

Hair care

In the hair care needs product group, there were two categories with negative trends in contrast with the preceding period when all seven categories enjoyed volume plusses. Currently running in arrears are hair conditioning rinses (−5.1 percent), and home permanent kits (−5.2 percent). The highest gains were found among hair dressing needs (+36.1 percent), where new mousse grooms have been proliferating. Hair kits such as Dippity Do and Dep have been showing growth and expanding the size of this category. Hair sprays had an increase of 12.0 percent or just under the 12.5 percent gain in the preceding period. The highest increase in terms of number of units was 1.2 million for shampoo, which was +5.4 percent on a percentage basis.

During the period ending March 30, the same two categories that had been downside during the preceding period were below last year's volume. The decline was only 0.8 percent for breath fresheners but amounted to 6.6 percent in the case of denture cleaners. The highest gain rates were 8.9 percent for toothbrushes and 3.8 percent for denture adhesives.

The only significant category loss in the proprietary remedy product group was a situation of continuing weakness among cough remedies. This category had a loss rate of 4.3 percent for the four-weeks and 2.8 percent for the full year. Proprietary tranquilizers declined 16.6 percent but on a small volume base. The highest unit volume increases, consistent with annual trends, were for eye care products (+20.5 percent) sleeping aids (+19.9 percent) and cold tablets (+12.7 percent). Much of the growth among eye care products has come from roll-out contact lens solutions where several brands have added new markets of food store distribution. The largest volume category in the product group—internal analgesics—showed a unit volume gain of only 0.8 percent, while antacids rose a minuscule +0.2 percent. A third category increasing less than 1 percent was chest rubs, ahead 0.7 percent for the four weeks. The most recent category to be added to the SAMI roster—appetite suppressants—had a unit gain of only 1.1 percent, well below the 12-week gain rate of 8.3 percent.

Shaving needs decline

Although there were unit volume gains in four out of five categories in SAMI's shaving needs product group, a loss of 4.5 percent in razor blades, the largest category in this group was sufficient to cause a small decline (0.6 percent) in the product group as a whole. Sales of shaving creams have been rising so consistently, one is almost surprised to see men with beards anymore, but the current rate of +8.0 percent is lower than the full year (+14.2 percent) or the 12 weeks (11.1 percent). New Soft Shave and Gillette Foamy Gel have played a role in increasing the size of this category.

The only 4-week loss situation among skin care aids categories was found among suntan lotion-suntan oil (−22.5 percent) and, in spite of the size of this decline, percentage-wise, during the winter months a fairly large percentage decrease does not translate into a large number of sales dollars. The two skin care aids product categories with substantial upward trends are lip care products (+26.5 percent) and hand & body creams/lotions (+20.8 percent). In both cases, the 28-day movement percent increase was higher than growth seen on either an annual or 12-week basis.

As can be seen, the majority of health and beauty aids categories are headed upward and thus far, 1984 is continuing the strong trends that prevailed during most of 1983. ■

HEALTH & BEAUTY AIDS: SAMI FOUR-WEEK FOOD STORE UNIT TRENDS VS. YEAR AGO

PRODUCT GROUP AND CATEGORY	% CHANGE VS. YEAR AGO		
	4 WEEKS ENDING 2/3/84	4 WEEKS ENDING 3/2/84	4 WEEKS ENDING 3/30/84
BABY NEEDS	+ 2.2%	+ 2.4	+ 1.2%
Baby Powders	− 6.7	+ 1.1	− 6.1
Baby Oils, Creams & Lotions	+ 7.3	+ 1.6	+ 4.4
Infant Clothes	−10.1	−10.8	− 9.7
Nursing Supplies	+ 5.1	+ 8.2	+ 5.2
DEODORANTS	+ 6.9%	+10.4%	+13.4%
Sprays	+ 2.5	+ 8.3	+ 8.5
Roll-On	+ 10.2	+ 16.3	+17.8
Stick Deodorants & Pads	+18.3	+15.0	+21.3
Creams	− 4.2	− 3.3	−11.6
Deodorants & Talcum Powders	− 2.2	+ 0.9	+ 2.6
Feminine Hygiene Deodorants	− 1.1	− 3.3	− 6.1
Foot Deodorants & Athlete's Foot Remedies	+ 5.6	+11.7	+ 8.5
Feminine Douches	+ 1.9%	− 1.2	+ 8.0
FIRST AID	+ 2.2%	+ 0.9%	+ 2.6%
Antiseptics	+ 4.2	+12.2	+ 8.8
First Aid Products	+ 1.8	− 1.6	+ 1.2
HAIR CARE NEEDS	+ 2.2%	+ 6.8%	+ 6.3%
Shampoos	+ 4.0	+ 5.3	+ 5.4
Hair Sprays	+ 2.3	+12.5	+12.0
Hair Conditioning Rinses	− 3.6	+ 3.9	− 5.1
Hair Setting Needs	+43.6	+34.4	+32.8
Home Permanent Kits	+ 1.3	+ 2.3	− 5.2
Hair Coloring	− 4.1	+ 2.4	+ 5.2
Hair Dressing Needs	+ 7.2	+14.9	+36.1
ORAL HYGIENE	− 0.7%	+ 3.8%	+ 1.6%
Toothpastes & Powders	− 2.0	+ 4.9	+ 0.9
Mouthwashes	+ 2.6	+ 0.8	+ 1.3
Breath Fresheners	----	− 1.1	− 0.8
Denture Cleaners	− 3.3	− 7.5	− 6.6
Denture Adhesives	+ 1.3	+ 0.6	+ 3.8
Toothbrushes	+ 5.8	+ 8.7	+ 8.9
PROPRIETARY REMEDIES	+ 2.0%	+ 1.1%	+ 1.9%
Antacids	+ 1.3	+ 1.3	+ 0.2
Internal Analgesics	+ 1.4	+ 4.1	+ 0.8
External Analgesics	+ 8.7	+ 2.4	+ 7.6
Cold Tablets	+11.7	+ 4.4	+12.7
Nasal Sprays—Drops—Inhalers	− 4.6	− 7.7	+ 3.4
Chest Rubs	− 6.8	− 5.9	+ 0.7
Cough Remedies	− 5.6	− 5.3	− 4.3
Laxatives	+ 0.9	− 0.7	+ 1.8
Sleeping Aids	+19.6	+25.8	+19.9
Tranquilizers	+30.9	−13.8	−16.6
Allergies	+ 8.1	+12.0	+ 8.2
Eye Care Products	+ 0.8	+14.3	+20.5
Appetite Suppressants	+19.5	+ 3.7	+ 1.1
SHAVING NEEDS	+ 4.0%	+ 6.8%	− 0.6%
Shaving Creams	+13.7	+11.8	+ 8.0
Pre-Shave Lotions	+ 8.5	+12.2	+ 4.8
After Shave Lotions	+12.1	+10.9	+ 7.9
Razor Blades	− 0.4	+ 1.1	− 4.5
Razors	+ 1.9	+18.3	+18.8
SKIN CARE AIDS	+12.6%	+ 7.9%	+ 8.4%
Hand & Body Creams & Lotions	+18.1	+11.5	+20.8
Facial Preparations	+ 4.4	+ 4.5	+ 0.3
Lip Preparations	+16.3	+17.9	+26.5
Suntan Lotion & Oil	+47.6	− 7.7	−22.5
Cleansers & Deodorants			
Skin Aids	+ 6.3	+ 1.0	+ 2.1
TOTAL HBA CATEGORIES	+ 2.6%	+ 4.3%	+ 3.8%